Oracle

Primavera Unifier Essentials User Guide

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Contents

Introduction

In addition to providing general information about Oracle Primavera Unifier Essentials, this document provides specific information about Workspaces, Oracle Primavera Cloud Integration in Unifier Essentials Shells, Oracle Primavera Cloud Integrations and Unifier Essentials Cash Flow (User mode), Project-Level Business Processes, Company-Level Business Processes, Organization-Level Business Processes, Reporting Programs, and how to access other Smart Construction Platform Applications.

For more information about using business processes (BPs) in general and using BPs with special behaviors, see the *Unifier Essentials Business Processes Reference Guide*.

Application Overview

Oracle Primavera Unifier Essentials lets you digitize and automate your capital asset planning and execution processes, which helps improve profitability, operational reliability, and risk management.

Within the system, you can manage project selection, cost, contract and information management, review cycles, and schedule. Unifier Essentials encompasses the following owner project management life cycle:

- **Planning**
  - Portfolio Management
  - Funding and Budget Management
- **Design**
  - Document Management and Submittals
- **Procurement**
  - Contracts and Procurement
- **Construction**
  - Field Management
  - Closeout
- **Operations**
  - Administrative
  - Libraries
  - Vendor Management
  - Project Management

The following shows the details for each Unifier Essentials project management life cycle:

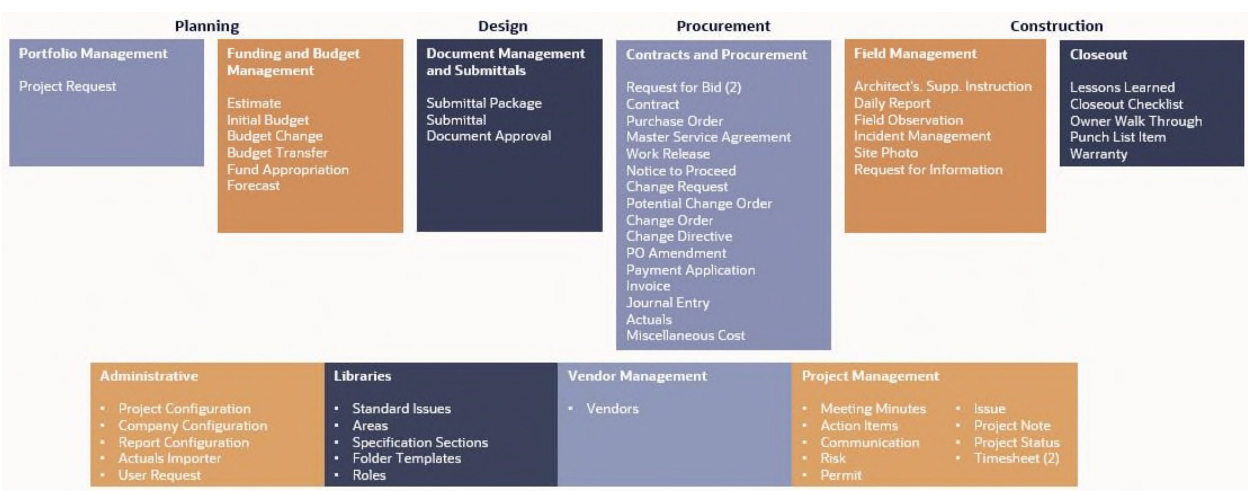


Figure 1: This image displays the details for Unifier Essentials project management life cycle.

Unifier Essentials provides a centralized web-based system for organizations to manage business processes, documents, and communications throughout projects.

Capabilities include business process automation, document management, project controls, collaboration, reporting, and other functions.

The system is configurable and comes preconfigured with many native modules specific to the construction management life cycle, and this section provides summary information about those modules. The rest of this user guide will provide details about other functions, in addition to more details about using the modules summarized here.

Modes of Operation and Access Control

Modes of Operation

Working with the modules (grouping nodes and functional nodes) in the system can be done in the following two modes of operation:

- **User** mode :

  Used to enter and access information and perform tasks within the system. Most users do their work in **User** mode. **User** mode lets users perform the day-to-day activities, collaborate through business processes and Mailbox, maintain managers (for example, Cost Manager and Document Manager), and run reports.

- **Admin** mode :

  Used for all administrative tasks within the system to set up and configure features and modules. Access to **Admin** mode functions is usually limited to a few users within a company. Company administrators work in **Admin** mode to set up, for example, company or project/shell properties, user permissions, templates for major features, data structures, and configure and set up business process (BP) workflows.

You can switch between modes using the mode icon (**User** mode and **Admin** mode).

Access Control

As a user, you must have permission to access the modules, or functions, in the system. The permissions to the various modules, or functions, are granted by the Company Administrator, in **Admin** mode. Contact your Company Administrator if you cannot access a module or function in the system.

About Consent Notices (Users)

Consent notices alert you to the need to protect personal information (PI). You and your organization might be collecting, processing, storing, and transmitting PI while using Unifier Essentials. When you accept a consent notice, your consent covers the collection, processing, storing, and transmission of PI data in all areas of Unifier Essentials and means of retrieving data from the system including but not limited to project export, downloaded tables, reports, documents, web services, API, and Unifier Essentials. If you refuse consent, you might not be able to access some areas of the system.

You may be asked to provide consent to show that you understand the need to treat PI as secure data. You may also be asked to provide consent for your organization to collect, process, store, and transmit your PI. If you refuse consent, you will be denied access to the system.

Cookies Policy

> **Note**: Follow the prompts, which are specific to your system setup.

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

When using the system, the server may generate cookies and send them to the user's browser. The user's machine stores the cookies, either temporarily by the browser, or permanently until they expire or are removed manually.

Each user that signs in to Unifier Essentials web will see a notification banner (Cookies in Unifier) that notifies the user that the system uses cookies. This banner has a link to the cookie policy which explains what information is being tracked by way of cookies. The user must click Got It to access the rest of the system.

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support. Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

For more information on Oracle's data collection processes and privacy commitments, see:

Oracle Cloud Services Agreement

http://www.oracle.com/us/corporate/contracts/saas-online-csa-us-1894130.pdf

Oracle Privacy Policy

https://www.oracle.com/legal/privacy/services-privacy-policy.html

Oracle Data Processing Agreement

https://www.oracle.com/corporate/contracts/cloud-services/

Product Accessibility Information

This topic includes guidelines and tips regarding accessible product usage.

Keyboard Shortcuts

The list of keyboard shortcuts for Oracle Primavera Unifier Essentials and Oracle Primavera Portal (access point for your Oracle Primavera applications), including page-specific and browser-specific keyboard shortcuts, can be accessed in the ***Navigating the System Using a Keyboard*** (on page 17) topic.

Common Symbols, Icons, and Tabs: What to Expect

The following are common symbols, icons, and tabs in the application and what they signify for the user.

Asterisks

An asterisk (*) after a column or field name indicates that the field is required. The field must be populated with valid information or users will encounter an error.

In This Section

Navigating the System Using a Keyboard

You can use your computer keyboard to navigate throughout the system. Use the Tab key on your keyboard to cycle through elements within the application and press the Enter key on your keyboard to access them. Use the application keyboard shortcuts to access frequently used or important functionality.

> **Note**: The keyboard shortcuts might change depending on the browser that you use.

Main Content Area

Use Ctrl and + or Ctrl and - to zoom in and zoom out anywhere in the application.

Use the Tab key on your keyboard to highlight the toolbar buttons and press Enter to make the action applicable.

Grids

A grid contains content rendered in a tabular format. Any grid has a similar method of interaction. Grids are extensively used in places such as the logs (for example: Business Process Record log, Line Item list, Document Manager log, Cost Manager log, Mailbox, and so on), Sheets (for example: Cost Sheet, Funding Sheet, Cash Flow worksheet, Activity Sheet, Portfolio Manager Sheet, and so on).

Only the rows that are visible are rendered. As you navigate up and down the table, more items will be visible.

To enter the table, tab to it. Tabbing to the table will cause an overlay to be displayed with the message Press tab to skip over this widget. Press Enter, Esc or click to enter the grid.

Use Arrows or Tab and Shift + Tab to navigate through the table. To move focus to another cell when you reach the end of the row, use the Arrows or Shift + Tab.

Editable Grid

Any grid that has editable content has a similar method of interaction. Examples of such grids are the Line item grids seen in business processes, manual entry columns in Cost Sheet, and so on.

Press F2 or Enter to put the cell in edit mode.

To select a value from a list of values (from the fields of type **Pull Down**, navigate to the cell by tabbing, and press F2 or Enter. Use the Up and Down Arrows to highlight an option. Press Enter to select the option.

To select a value from a calendar picker (from the fields of type **Date** and **Date Only** pickers), navigate to the cell by tabbing, and press F2 or Enter. Use the Tab key to change the Month and Year selection and use the Up and Down Arrows to highlight an option. Press Enter to select the option.

Individual Web Elements

Hyperlink Fields

1) Tab to enter into the Hyperlink field.
2) Press Enter to view the Hyperlink field attributes.
3) Tab to the Name field and enter your choice.
4) Tab to the URL field and type in the URL.
5) Tab to access the Clear, Cancel, or Done options.
6) Press Enter to select choice and close the hyperlink field.

Pull-Down

1) Tab into the cell.
2) Press Enter.
3) Use Up and Down Arrows to highlight the option.
4) Alternatively, type the value.

5) Press Enter to select the option.

Picker

1) Tab into the cell.
2) Press Enter.
3) Type a value for the Display Element.
4) Press Up and Down Arrows to highlight choice.
5) Press Enter to select choice and close picker.

Multi Select Input fields

Option 1:

1. Tab into the cell.
2. Press Up and Down Arrows to highlight choice.
3. Select your choice.
4. Press Enter to select it.

Option 2:

1. Tab into the cell.
2. Type a value.
3. Press Up and Down Arrows to highlight choice.
4. Press Enter to select it.

Date Picker fields

Option 1:

1. Tab into the cell.
2. Type the date in the format specified.
3. Press Enter.
4. Tab out of the cell.

Option 2:

1. Tab into the cell.
2. Use the Up, Down, Left, and Right arrows to select a value.
3. Tab to select the Action button.
4. Press Enter.

Number Fields

1. Tab into the cell.
2. Enter the value.
3. Tab out of the cell.

Text Fields

1. Tab into the cell.

2. Enter the string.
3. Tab out of the cell.

Using Shortcut Keys

The following tables list the menu options that have shortcut keys. If an option is not listed, it does not have a shortcut key.

Function Keys Supported in Unifier Essentials

Command	Function Key
Reload / Refresh	F5
Close browser windows	Alt + F4

Hot keys Supported in the Editable Grid of Unifier Essentials

Command	Hot Key
Select All	Ctrl A
Cut	Ctrl X
Copy	Ctrl C
Paste	Ctrl V
Undo	Ctrl Z
Redo	Ctrl Y

Keyboard End User Information

The following table explains the keyboard shortcuts for specific UI elements such as lists and menus:

Target	Key	Action
List Item	Enter or Space	Selects list item.
	Up Arrow	Moves focus to the previous visible list item.
	Down Arrow	Moves focus to the next visible list item.
	Right Arrow (Left Arrow in RTL)	For horizontal navigation list and focus will be moved to next visible item.
	Left Arrow (Right Arrow in	For horizontal navigation list and focus will be moved to

Target	Key	Action
	RTL)	previous visible item.
	Home	Moves focus to the first visible list item.
	End	Moves focus to the last visible list item.
	F2	If focus is on a list item, pressing F2 will make its contents accessible using Tab.
	Esc	When F2 mode is enabled, press Esc to exit F2 mode.
	Shift+Tab	Move focus to hierarchical menu option. This is only applicable for sliding navigation list and when hierarchical menu option is enabled.
Group Item	Right Arrow (Left Arrow in RTL)	If focus is on collapsed node, expands the sub list.
	Left Arrow (Right Arrow in RTL)	If focus is on expanded node, collapses the sub list.
List Item in sublist	Esc	Applicable only for sliding navigation list. If focus is in a sublist, it closes the sublist and moves focus to the parent list item.
Hierarchical Menu button	Enter	Open menu. Refer to the menu keyboard documentation. This target is visible only for sliding navigation list.
	Tab	Moves focus to current list item. This target is visible only for sliding navigation list.
	Shift + Tab	Moves focus to Previous Icon. This target is visible only for sliding navigation list.
Overflow Menu button	Enter or Space	Open menu. Refer to the

Target	Key	Action
		menu touch documentation. This is applicable only for horizontal navigation list when overflow is set to pop-up.
Previous Icon or List Header	Enter	Collapses the sublist and slides to parent list. This target is visible only for sliding navigation list.
	Tab	Moves focus to Hierarchical Menu option. This target is visible only for sliding navigation list.

Configuring Your System

Ensure that the necessary browser settings (within the supported browsers) are configured for the computers that access Unifier Essentials. For the full list of system requirements and versions, refer to the *Unifier Essentials Client System Requirements* document.

Supported Browsers and Settings

You can use the system with the following supported browsers:

- Microsoft Edge
- Mozilla Firefox
- Google Chrome
- Apple Safari

> **Note**: For the full list of system requirements, supported software, and versions, see the *Unifier Essentials Client System Requirements* document.

Microsoft Edge

Refer to Microsoft Edge Help to see the details on language settings and how to set up the options explained here.

Mozilla Firefox

Refer to Mozilla Firefox Help to see the details on language settings. If your internet settings are customized, contact your IT for more information. When finished, sign out of Unifier Essentials and close the browser completely for the new settings to take effect.

Google Chrome

Refer to Google Chrome Help to see the details on language settings. If your internet settings are customized, contact your IT for more information. When finished, sign out of Unifier Essentials and close the browser completely for the new settings to take effect.

Apple Safari

Refer to Safari Help to see the details on how to set up the options explained here.

To use Apple Safari, you must set Java to Run in Unsafe Mode, in browser preferences. Go to **Preferences**, under Security select **Java**, select **Run in Unsafe Mode**, and click **OK**.

User Interface (UI) Content and Internationalization

The contents that appear in the application UI (also known as System Strings) cannot be modified by the users. The System Strings are available in different languages, per user preferences.

Example

Sign In and Terms and Condition pages, Menus, Alerts, and Errors

In contrast, the content of the material created by the users (also known as Custom Strings) can be translated into different languages. For more information, see ***Translating Custom Strings (Internationalization) https://docs.oracle.com/cd/F46346_01/English/admin/general_admin/10282010.htm***.

Example

Business Process (BP) name, Data Element (DE) label, drop-down values, radio button, text in lines, navigation log names, and multi select values

Notes:

- The user input data (data entry) in Business Processes (BPs), attribute forms of various managers (Cost Manager, Document Manager, and so on), and other similar elements, when entered at runtime, cannot be translated.
- User's data entry must be saved “as-is” and include support for single and multi-byte characters UCS Transformation Format—8-bit (UTF-8).

User Name and Password

To sign in, you might start by signing in to Primavera Lobby first or you might sign directly in to Unifier Essentials. However, before you can sign in to Primavera Lobby or Unifier Essentials, you must have a user account, which will provide you with a Username and a Password that you can use. Your Company Administrator should be able to create your user account and provide you with your Username and Password.

Note: If the Oracle Primavera Customer Support Team is administering the setup and user administration for your company, you will receive your Username and Password directly from them.

Sign In for the First Time

To sign in the first time:

1) Open your browser and enter the web address that your site administrator provided to you.
2) Enter your **Username** and click **Next**.
3) Enter your **Password** and click **Sign In**.
4) Review the Consent Agreement, select the **I have read the consent agreement and agree to its terms** checkbox, and click **Accept**.
5) After you accept the agreement and the Cookies in Unifier message appears, review the policy, and click **Got It**.

Notes:

- The Lobby lets you access your projects that are managed in both Unifier Essentials and Oracle Primavera Cloud. For details about the Lobby, refer to the ***Construction and Engineering Lobby Help*** (see Construction and Engineering Lobby Help - ***https://docs.oracle.com/cd/F23711_01/help/en/202246.htm***) (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).
- After you sign into the Lobby, you can view all the projects/shells that you are a member of.

Forgot Password

If you must reset your password, click **Need help signing in** after you enter your **Username**, and follow the instructions that appear on the screen.

Sign In, Sign Out, and Session Timeout

Sign In and Sign Out

Notes:

- The Sign In window appears based on the supported browser language. If the language is not supported, the Sign In page appears in English.
- After signing in, the language will be based on the Language selected in **Preferences**.
- To sign in, you might start by signing in to Primavera Lobby first or you might sign directly in to Unifier Essentials. The Lobby lets you access your projects that are managed in both Unifier Essentials and Oracle Primavera Cloud. After you sign into the Lobby, you can view all the projects/shells that you are a member of. For details about the Lobby, refer to the ***Construction and Engineering Lobby Help*** (see Construction and Engineering Lobby Help - ***https://docs.oracle.com/cd/F23711_01/help/en/202246.htm***) (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).

To access the **Sign In** window:

1) Open your browser and enter the web address that your site administrator provided to you.
2) Enter your **Username** and click **Next**.
3) Enter your **Password** and click **Sign In**.

Note: If you receive a message regarding the Base Currency for the company the first time that you sign in, click **OK** and contact your Company Administrator. The Base Currency is the default currency used by the company. Although it might be set by Oracle when the system is first provisioned, the Base Currency must be selected the first time that the Company Administrator signs in. No other users are allowed to sign in until the Company Administrator sets the Base Currency.

If you have trouble signing in, check to ensure that:

- The Caps Lock function is not on (user names and passwords are case-sensitive).
- You entered the correct user name and password.

If you still have trouble signing in, contact your Company Administrator or Oracle Customer Support.

To sign out:

1) In the upper-right corner of the screen, click your name to open the **User control panel**.
2) Click **Sign Out**.

Session Timeout

The system displays a warning after two hours of inactivity, although this period of inactivity might be different depending on your environment: **Session Inactive**.

- If you click **Stay Signed In**, your session remains active. This also applies to Unifier Essentials sessions running in other browser tabs.
- If you do not respond, or if you are inactive for more than the allotted time, the system terminates your session and displays an alert: **Your login session may have expired due to inactivity**.

When your session expires, the system redirects you to the sign in page if there are no other active sessions running, or there are inactive sessions in other browser tabs.

Security Warnings

The first time you perform certain functions in the system, security warnings may appear from third-party software confirming the use of Java plug-ins from these business partners.

Follow the instructions below to prevent the warnings from recurring every time that you use the functionality that requires these certificates.

Preventing a Security Warning from Recurring

A first-time user may receive a security warning. When prompted by your browser to acknowledge a security warning in Unifier Essentials, you may select your browser option to ignore future warnings. The setting to ignore warnings varies by browser.

File Viewer Option

The following discusses a basic user preference setting that should be configured before using the system for the first time.

For more information regarding all **Preferences** settings, see ***Preferences*** (on page 46).

File Viewer Option (Select Default Viewer)

There are two methods of viewing files:

- **Native:** The Native viewer lets you view most file formats in the application in which you created or regularly view them. In other words, if you view a .docx file in Native, Microsoft Word will open and display the .docx file. If your Company Administrator enabled Office 365 integration, you can also view and update Microsoft Office documents in the Document Manager and BPs using Microsoft 365 (Office for the web). You can view and modify Excel (XLSX), PowerPoint (PPTX), and Word (DOCX) files; you can only view Comma Separated Values (CSV) files. Microsoft 365 integration for documents is supported with the following types of BPs:
  - Generic Line Item
  - Cost type with Line items with CBS code
  - Document Type
  - Simple
- **Unifier Viewer:** Unifier Viewer is the default option. It lets you view and mark up documents. The markups are saved as markups without changing the original file. Unifier Viewer supports the document file types listed in the table below. When you add documents through a business process (BP) or the Document Manager (DM), a brief delay might occur while the system converts the file so that it can be viewed and marked up using Unifier Viewer.

Supported File Types with Unifier Viewer

File Type	File Type	File Type	File Type	File Type	File Type	File Type
BMP	DOTX	JFIF	ODT	PPSX	TXT	XLT
CSV	DWF	JP2	PDF	PPT	VSD	XLTM
DGN	DWG	JPC	PNG	PPTM	VSDX	XLTX
DOC	DXF	JPEG	POT	PPTX	WMF	
DOCM	EMF	JPG	POTM	PUB	XLS	
DOCX	EML	MSG	POTX	RTF	XLSB	
DOT	GIF	ODP	PPS	SVG	XLSM	

File Type	File Type	File Type	File Type	File Type	File Type	File Type
DOTM	HTML	ODS	PPSM	TIF	XLSX	

Supported File Formats with Downloaded Unifier Wallet Zip File

The following file formats are supported if you downloadd the Primavera Unifier Wallet zip file:

File Type	File Type	File Type
DOC	JFIF	TIF
DOCM	PDF	XLS
DOCX	PNG	XLSM
DOT	POT	XLSX
DOTM	PPT	XLT
DOTX	PPTM	
JPG	PPTX	
JPEG	PPS	

Supported File Formats with WebViewer Server Installation

The following file formats are supported if you install the WebViewer Server:

File Type	File Type	File Type	
BMP	HTML	PPSM	XLSB
CSV	JP2	PPSX	XLTM
DGN	JPC	PUB	XLTX
DWF	MSG	RTF	
DWG	ODP	SVG	
DXF	ODS	TXT	
EMF	ODT	VSD	
EML	POTM	VSDX	

File Type	File Type	File Type	
GIF	POTX	WMF	

User Interface

The application user interface (UI) contains the following sections:

- Header section
- Tabs section
- Left navigation section
- Right pane section

The following explains each section in detail.

The header section contains the following elements, from left to right:

- **Switch Applications** (**):** Lets you go to other applications that are linked to Unifier Essentials. For more information, see ***Access Other Smart Construction Platform Applications*** (on page 541).
- **Announcements** (**):** Lets you view company-wide announcements.
- **Bookmarks:** Lets you add and view bookmarked pages.
- **View Help menu** (**):** Contains the following helpful links:
  - **Unifier Help Library:** Opens the Unifier Essentials library for information about various features.
  - **Company Help:** If your organization provides company-specific help, you can access this option. If the URL provided by your Company Administrator is invalid, an error message is displayed.
  - **Contact Support:** Lists the contact information for various support resources for assistance in using the system.
  - **About Unifier:** Displays the version of Unifier Essentials that you are using, copyright information, and other Oracle policies.
- **User control panel:** Displays the name of the person who has signed in. If you click the name, you will be able to access the following features:
  - **Get Unifier Mobile App:** Displays information for downloading the Unifier Mobile App.
  - **Preferences:** Lets you change your user preferences, including general information and email subscriptions.
  - **Last Login:** Displays the last time you logged into Unifier Essentials.
  - **Sign Out:** Signs you out of the system.
- **Switch Tenants:** If you have login access to multiple tenants, a drop-down arrow appears next to your name, as shown above, which lets you switch tenants.

The tabs section contains the following elements:

- **Home** tab (Home workspace) ( )
- **Company Workspace** tab
- **<shell name>** tabs (or shell tabs)
- **Switch to tab** drop-down option ( ): Shows a list of all open tabs to choose from. This is useful if you have multiple tabs open and they do not fit on the page.

- **New tab** button (+): Adds a new tab from a list of Recent Locations, Key Locations, or Bookmarks.

> **Note:** On touchscreen-enabled devices, the close button (x) is displayed for every tab in the bar at the top of the application, instead of being displayed only for the active tab.

The **Home** tab (Home workspace) does not have an **Admin** mode or **User** mode. The left Navigator contains the following nodes:

- **Home**
- **Tasks**
- **E-Signatures**
- **Drafts**
- **Mailbox**
  - **Inbox**
  - **Notifications**
  - **Sent Items**
- **Master Log - Business Processes**
  - **Project Configuration**

> **Note**: The list of nodes in the left Navigator might vary depending on your permissions.

In the right pane, the Oracle Guide Learning (OGL) widget is displayed. For more information on OGL, see ***Oracle Guided Learning (OGL)***.

Additionally, the right pane of the **Home** tab (Home workspace) displays the information pertaining to the node—**User** or **Admin**—selected in the left Navigator.

When in **User** mode, the **Company Workspace** tab lets you access the following nodes in the left Navigator:

- <Company name> **- Home**
- **Tasks**
- **E-Signatures**
- **Notifications**
- **Drafts**
- **General**
- **Cost Manager**
  - **Cost Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/73489.htm#t73489**
  - **Cash Flow https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298265.htm#t10298265**

  - **Funding https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/73497.htm#t73497**
- **Document Manager https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298018.htm#subhead_documentslogorcompanydocuments28**
  - **Company Documents**
  - **Unpublished Documents**
  - **Recycle Bin**
- **Company Logs**
  - **Master Service Agreement**
  - **Project Request**
  - **User Request**
  - **Vendor**
- **Company Lists and Pickers**
  - **Folder Template**
  - **Master Area Template**
  - **Master Rate Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10296872.htm#t10296872**
  - **Report Configuration**
  - **Role**
  - **Specification Section Template**
  - **Standard Issues**
- **Reports**
  - **User-Defined https://docs.oracle.com/cd/F46346_01/English/admin/modules_admin/74726.htm#t74726**

> **Note**: The list of nodes in the left Navigator might vary depending on your permissions.

The right pane of the **Company Workspace** tab displays the information pertaining to the node selected in the left Navigator.

When in **User** mode, the **<shell name>** tab (shell tab) lets you access the following nodes in the left Navigator:

- <Shell name> **- Home** (at the very top)
- **Tasks https://docs.oracle.com/cd/F46346_01/English/user/business_processes_ref/73276.htm#t73276**
- **Drafts https://docs.oracle.com/cd/F46346_01/English/user/business_processes_ref/73224.htm#t73224**

- **Directory**
- **Mailbox https://docs.oracle.com/cd/F46346_01/English/admin/modules_admin/74300.htm#t74300**
  - **Inbox**
  - **Notifications**
  - **E-Signatures**
  - **Sent Items**
  - **Drafts**
  - **Deleted Items**
- **Project Mailbox https://docs.oracle.com/cd/F46346_01/English/user/business_processes_ref/10292256.htm#t10292256**
  - **Inbox**
  - **Unpublished Attachments**
- **Information**
  - **General**
- **Document Manager & Submittals https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10292851.htm#t10292851**
  - **Documents**
  - **Unpublished Documents**
  - **Recycle Bin**
  - **Document Approval**
  - **Submittal**
  - **Submittal Package**
- **Financial Analysis**
  - **Cost Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298362.htm#t10298362**
  - **Cash Flow https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298240.htm#t10298240**
  - **Funding Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298364.htm#t10298364**
  - **Schedule of Values https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10298363.htm#t10298363**
    - **General Spends**
    - **Payment Applications**
- **Budget Management**

  - Estimate
  - Fund Appropriation
  - Initial Budget
  - Budget Change
  - Budget Transfer
  - Forecast
- Commitments
  - Request for Bid
  - Contract
  - Purchase Order
  - Work Release
  - Notice to Proceed
- Change Management
  - Change Request
  - Change Directive
  - Change Order
  - Potential Change Order
  - PO Amendment
- Actuals
  - Actual
  - Invoice
  - Journal Entry
  - Miscellaneous Cost
  - Payment Application
- Project Management
  - Action Item
  - Communication
  - Issue
  - Meeting Minutes
  - Permit
  - Project Note
  - Project Status
  - Project Timesheet
  - Risk
  - Gates
    https://docs.oracle.com/cd/F46346_01/English/admin/modules_admin/74364.htm#t74364
- Field Management
  - Architect's Supplemental Instructions
  - Daily Report

- **Field Observation**
- **Incident Management**
- **Request for Information**
- **Site Photo**

- **Project Closeout**
  - **Lessons Learned**
  - **Owner Walk Through**
  - **Punch List Item**
  - **Project Closeout Checklist**
  - **Warranty**
- **Schedule Management**
  - **Activity Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10297287.htm#t10297287**
  - **WBS Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10299300.htm#t10299300**
- **Activity Manager**
  - **Rate Sheet https://docs.oracle.com/cd/F46346_01/English/user/managers_ref/10297289.htm#t10297289**
- **Reports https://docs.oracle.com/cd/F46346_01/English/user/user_guide/10296660.htm#t10296660**
  - **User-Defined**
  - **Cash Flow History**
  - **Cash Flow Report**
  - **Commitment Summary**
  - **Detailed Contract Summary**
  - **Open / Overdue Tasks Summary**
  - **Project Cost Report**
  - **Project Details**
  - **Project Schedule Summary**
  - **RFI Log**
  - **Schedule Comparison**
  - **Schedule Lookahead**
  - **Schedule Report**
  - **Text Search**
  - **Administrative**
    - **Audit**
    - **Business Process Access Control**

- **Business Process Permissions**
- **Usage Analysis**
- **User Group Membership**
- **Workflow Setup Documentation**

Note: The list of nodes in the left Navigator might vary depending on your permissions.

The right pane of the **<shell name>** tab (shell tab) displays the information pertaining to the node selected in the left Navigator.

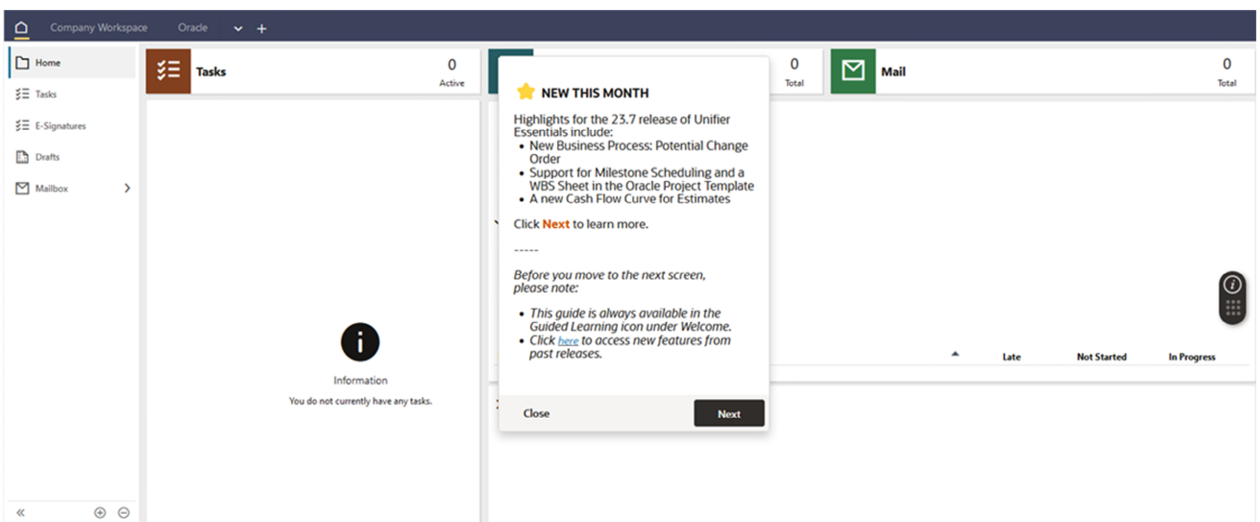
In This Section

Oracle Guided Learning (OGL)

Oracle Guided Learning (OGL) provides you with contextual support at various points throughout the system.

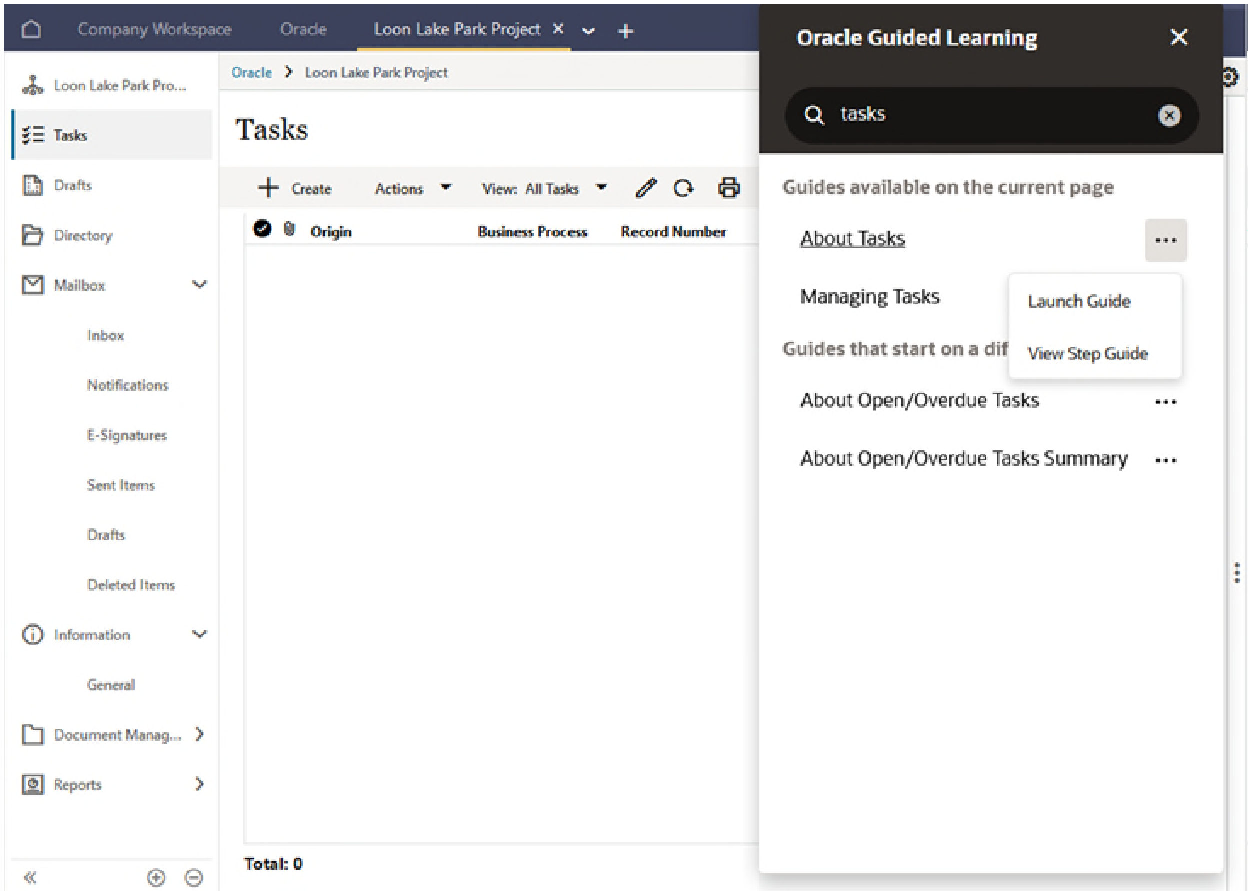
After you sign in, OGL highlights the latest changes, such as improvements or new features.

Figure 2: Example of highlights provided in Oracle Guided Learning widget



Whenever you see the OGL widget, you can click the upper segment to access global or context-sensitive help (or both), as well as step-by-step, interactive guides for common tasks.

Figure 3: OGL table of contents



To move the OGL widget to a different (top, bottom, left, or right) side of the page, click the lower segment of the widget and drag it to the new location.

Preferences

To access the **Preferences** (user preferences) window:

1) In the upper-right corner of your window, click your user name to open a contextual menu.

   The menu offers a limited set of choices that are available in the current state, such as Get Unifier Mobile App, Preferences, and so on.

2) Select **Preferences**.
3) Use the tabs described in the following topics as needed.

General Tab

Use the **General** tab of the **Preferences** window to view your company contact information as it is listed in the company directory. This information includes your Name, Title, Email, Work Phone number, Mobile Phone number, Pager number, Fax number, and Address.

Notes:

- The Company Administrator manages user profiles, including the contact information. Contact your Company Administrator if you want to update your information.
- If the **Hide personal information on user profiles** option is selected (by the administrator) in the **Security** tab of the **Company Settings**, you cannot view the basic information, which includes field values such as email address, phone number, and so on. This applies to the basic information that is available as a part of a user profile.

To add a photo to your profile, click **Upload Profile Photo** on the left. The Image picker supports images of type jpg, jpeg, png, and tiff.

Email Subscription Tab

The **Email Subscription** tab lets you set up email subscription details. The tab contains the following blocks and fields:

- Email Subscription
  - Send notifications in single daily digest
- Workflow Business Processes
- Non Workflow Business Processes
- Portfolio Manager
- Document Manager - Project/Shell
- Document Manager - Company
- Mailbox
- User Defined Reports
- Alerts
- Gates
- Project/Shell
- E-Signatures

The following topic provides details.

Selecting Email Subscription Options

The Email Subscription tab lets each user to control the number, type, and frequency of Unifier Essentials-related email notifications received. Users can subscribe to, or opt-out of, receiving email notifications for events.

Send notifications in single daily digest

Select this option if you want to receive your email notifications in a consolidated email, once a day (single daily digest), instead of receiving the notification emails individually and per event. Deselect this option to receive email notifications individually and per event.

> **Note:** The maximum number of messages in a single daily digest depends on the length of the messages. The system will send up to the latest 100 messages in single daily digest. The older messages will be removed and will not be included in the digest.

Before you begin selecting email subscription options

Permission

To receive an email notification for a module or event, you must have view permission for that module or event. This view permission is set in Admin mode.

> **Note:** If you do not have view permission, your email notifications settings do not override the original permissions (set by your Company Administrator), and you only get email notifications for modules or events that you have permission to view.

Document Manager notifications

In addition to module-level view permission, you must also have at least view permission on the specific documents or folders that would generate the event email. These permissions are set by Company Administrator and from within the Document Manager. In addition, the owner of the folder has the option of not generating email notifications for specific events.

External email accounts

If you are using an email address from a generic email account such as Yahoo, Hotmail, and so forth, your spam filter may filter out these notifications. Refer to your email provider regarding how to allow these notifications to reach your inbox.

To receive email notification for a module or event:

1) Go to the **More** tab in the **Preferences** window.
2) Select your choices from the scrolling window. For more information, see the following tables.

To opt out of receiving email notifications for a module or event, clear the items from the scrolling window.

To subscribe to or opt out of email notifications:

1) Go to the **Email Subscription** tab in the **Preferences** window.
2) Select the modules and events for which you want to receive email notifications. If you do not select a module or event, you do not receive email notifications related to the unselected module or event. For more information, see the following tables.

   The events apply to the following modules:

   - Workflow business processes
   - Non-workflow business processes

- Document Manager - Project/Shell
- Portfolio Manager
- Document Manager - Company
- Mailbox
- User Defined Reports
- Alerts
- Gates
- Project/Shell
- E-Signatures

3) To opt out of receiving email notifications regarding specific events, clear the checkbox for the notification.
4) To receive email notifications in one email summary per day, select the **Send notification in single daily digest** checkbox. The summary email will be sent if one or more events trigger an email notification.
5) When finished, click **Apply** and **OK**.

Notes:

- For permission-based emails, email notification is usually sent the first time permission has been granted and not when permissions are modified, unless otherwise noted.
- Document Manager email notifications are only sent if users have at least view permission on the affected item and if the item owner enables email notification.

Modules and Events Options

This section describes the events within each module.

Workflow Business Processes

These events pertain to business processes. To receive notification, you must have at least view permission for the business process (BP). You can opt to receive email notification. See the following table for details.

For	When
Personal tasks	You are part of the assignees list when a BP is sent (this becomes a task for you).
Decline tasks	A task is declined by one or more of the assignees that you have added to a BP that you sent.
Overdue personal tasks	An assigned task is past the due date. **Note:** A notice is only sent once; you will not receive regular reminders of overdue tasks.

For	When
Messages	Someone cc's you on a BP.
Record Workflow Complete	The record Workflow is complete and the Workflow end step has been reached; this is applicable on any Workflow BP where user is selected as part of the "Notify users on workflow completion" setup under the **Setting** tab of **BP Setup**.
Record Modification	A certain step occurs in a workflow (if your Administrator has enabled workflow actions for the workflow step) that needs action. Actions are shown as hyperlinks in the email.

Non-Workflow Business Processes

These events pertain to non-workflow business processes. To receive notification, you must have at least view permission for the business process (BP). You can opt to receive email notification. See the following table for details.

For	When
Record Creation	A new record is created.
Record Modification	A record or line item is modified, a line item is added or deleted, comments or attachments are added, attachments are removed.

Portfolio Manager

For	When
Scenario Shared or Approved	When the user has defined the list of users, or groups, in the Portfolio Manager configuration, after the scenario sheet is approved or shared, the respective list of users, or groups, will receive the notification. If the list of users, or groups, is defined in the Portfolio Manager configuration, but the option in user preferences is not selected, the user will not receive any notification. This option is not selected by default. The option will also be seen in the "User Preference Template," in the Preferences tab. When the "update users" action is performed, the value is pushed to the user preferences. The subject of email notification that is received by user states if a Project Portfolio scenario sheet is approved, or approved and shared. **Note:** Only an active user receives the notifications.

Document Manager - Project/Shell and **Document Manager - Company**

Note: With this module in particular, a user modifying multiple documents or folders, or folders with many subfolders, can potentially trigger a large amount of email. You can prevent receiving too many notifications by choosing the digest notification (one email) option, or limit the events for which you want to receive notification.

Users with view permission (set in the Document Manager) on the applicable document, folder, or shortcut target receive notification when the following occurs:

For	When
Document upload	A new document is uploaded into the folder.
Transfer ownership	File or folder ownership is transferred. The new owner is notified.
Move	A document, folder, or shortcut is moved from one location or folder to another.
Delete	A document, folder, or shortcut is deleted.

For	When
Document revise	A document is revised.
Folder rename	A folder is renamed.

Mailbox

For	When
Personal Mail	Users receive an email notification when new mail is received.

User Defined Reports (UDRs)

For UDRs, the users receive email notification under following conditions:

For	When
New report granted	The user is granted at least run permission to a user-defined report by another user.
Results from scheduled reports	When a scheduled report has been generated and the results are available; requires run permission be granted for the report.

Alerts

For alert, the users receive email notification under following conditions:

For	When
Each alert	Users can receive notification when an alert is generated.

Gates

For	When
Change Phase Notification	User receives notification when a phase is changed.
Auto-email PDF Gates run	User receives a PDF copy of an automated gates run.

Project/Shell

For	When
Successful Creation	The Program Manager, Project Manager, or Project Administrator receives notification of the successful creation of a project/shell. This notification occurs if the project/shell is created manually, through Web Services, using a CSV file, or through auto-creation.

E-Signatures

For	When
E-Signature Requests	An internal signee receives email notification for the E-Signature request created in the **E-Signatures** functional node. When you select the E-signature Requests option in the User Preferences, the system sends an email to the user when an E-Signature request is created for that user in the **E-Signatures** functional node at company or project/shell.

When you select **Send notifications in single daily digest**, and there are notifications relating to the **E-Signature Requests**, the single digest email to the recipient will contain the E-Signature message along with other messages in the email. The header section (where hyperlinks to each message within the digest are mentioned) contains the hyperlink to the E-Signature message with the text: <Document Name> is sent to you for review and sign.

> **Note:** You do not have the option to send the document as an attachment in the email notification.

You can send the documents in the Document Manager, and the documents attached to a business process record for review and signature to one or more Unifier Essentials and non-Unifier Essentials users.

Region Format Tab

Use the **Region Format** tab to manage settings such as:

- Language, date, and time format
  - Preferred Region
  - Language
  - Time Zone
  - Date Format
- Number and Currency formats
  - Decimal

- Digit Grouping Symbol
- Digit Grouping
- Show Currency Symbol
- Positive Currency Format
- Negative Currency Format
- Negative Number Format

This tab also provides a Currency Example.

Changing Time Zone and Date Format

The following settings are maintained in the **Region Format** tab of your **Preferences**.

The **Time Zone** setting affects the date stamp that appears on the actions that you perform, such as saving or uploading files, running user-defined reports (UDRs), and due dates of tasks assigned to you. The date stamp is effective as of 12:00 AM in your time zone.

Example

If your time zone is Eastern Standard Time and your task is due August 1, then at 12:00 AM August 1 your task is due — even if it is only 9:00 PM July 31 in Pacific Standard Time.

Note: The Time Zone setting is based on the Coordinated Universal Time (UTC).

To set the time zone:

1) Go to the **Region Format** tab in the **Preferences** window.
2) From the **Time Zone** drop-down list, select a time zone based on your locale.
3) When finished, click **Apply** and then **OK**.

The **Date Format** determines how date fields appear.

To set the date format:

1) Go to the **Region Format** tab in the **Preferences** window.
2) From the **Date Format** drop-down list, select a date format.
3) When finished, click **Apply** and then **OK**.

The system supports the following *additional* date formats:

Notes:

- The time format for all dates is: HH:mm. The Date Format options is displayed without AM to support the 24-hour format. For example, in the Date Format drop-down, instead of MM/DD/YYYY HH:mm AM, MM/DD/YYYY HH:mm is displayed to enable you to select the 24-hour time format. The uppercase MM in the date format denotes month and lowercase mm denotes minutes.
- The system provides you the option to select 24-hour date time format in all modules, after this is set in the user preferences (**Preferences**). This is supported for all Standard, Portal, Partner

users, and bidders.

- MM/DD/YYYY
- DD/MM/YYYY
- MM/DD/YY
- DD/MM/YY
- MM-DD-YYYY
- DD-MM-YYYY
- MM-DD-YY
- DD-MM-YY
- DD.MM.YYYY
- YYYY-MM-DD
- MMM/DD/YYYY
- DD/MMM/YYYY
- YYYY/MMM/DD
- M/D/YYYY
- M/D/YY
- D/M/YYYY
- D/M/YY
- YY/M/D
- YYYY/M/D
- YY/MM/DD
- YYYY/MM/DD

Changing Number and Currency Formats

The **Number and Currency Formats** section of the **Region Format** tab of your **Preferences** lets you:

- Select a **Preferred Region** from a list. This is the region that you want.
- Set the **Decimal Symbol** for your currency from a list.
- Set **Digit Grouping** from a list.
- Set **Show Currency Symbol** to show or not.

Note: If the administrator does not select the **Show Currency Symbol** option, the system ignores the options that are selected for **Positive Currency Format** and **Negative Currency Format**, and does not display symbols. The following applies to all objects (such as Form, Sheet, Cash Flow, Dashboard, and Log) that use the Currency Data Element.

- Set **Digit Grouping Symbol** from a list.
- Set **Positive Currency Format** from a list.
- Set **Negative Currency Format** from a list.
- Set **Negative Number Format** from a list.

When finished, click **Apply** and then **OK**.

The Number and Currency Formats section of the **Region Format** tab also provides examples for the following:

- Currency
- Decimal Number
- Integer Number

The examples show the arrangement of the numbers (the way the numbers are displayed) in the forms when a particular formatting option has been selected.

For decimal numeric data, the precision is governed by the "Decimal Places" set in the Data Element properties.

> **Note:** When the Company Administrator creates a User and selects a language, the values of the number formats are populated accordingly and displayed in the **Region Format** tab of the **Preferences** window. The number formatting options are not displayed in the User Properties window. The number formatting options are displayed in the **Preferences** window. If the Company Administrator changes the language value in the User Properties window, the **Region Format** tab of the **Preferences** window shows the same languages as in User Properties window and the number formatting options remain the same.

Changing Language

The following settings are maintained in the **Region Format** tab of your **Preferences** window.

To set the language:

1) Go to the **Region Format** tab in the **Preferences** window.
2) From the **Language** drop-down list, select your language.
3) When finished, click **Apply** and then **OK**.

> **Note:** The languages listed are the active languages selected by the administrator in the **Configuration - Internationalization** log.

The following languages are supported:

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Dutch
- English
- French
- German
- Italian
- Japanese
- Korean

- Portuguese (Brazil)
- Russian
- Spanish

Note: The rendering of Unifier Essentials content in Arabic language in third-party applications (such as Email Client, Adobe for PDF, and so forth) is outside of the application purview.

Numeric Format Based on Language Selection

The Numeric formats such as the decimal symbol, grouping, and so forth are based on the language selected for the bidder.

For the Vendors records that are created through CSV or Web Services, the user can specify the values for the Language, Time Zone, and Date Format Data Elements and create Vendors records in Bulk. The existing codes for these fields can be used to specify the values. The list below is derived from the Java API.

Language	Region Format	Decimal Symbol	Digit Grouping Symbol	Digit Grouping	Positive Currency Format	Negative Currency Format	Negative Number Format
Simplified Chinese	Chinese (Simplified, PRC)	. (period)	, (comma)	123,456, 789	#123	#-123	-123
Traditional Chinese	Chinese (Traditional, Taiwan)	. (period)	, (comma)	123,456, 789	#123	-#123	-123
Dutch	Dutch (Netherlands)	, (comma)	. (period)	123,456, 789	# 123	# -123	-123
English	English (United States)	. (period)	, (comma)	123,456, 789	#123	(#123)	-123
French	French (France)	, (comma)	Space represented by blank in the product	123,456, 789	123 #	-123 #	-123
German	German (Germany)	, (comma)	. (period)	123,456, 789	123 #	-123 #	-123
Italian	Italian	,	. (period)	123,456,	# 123	-# 123	-123

Language	Region Format	Decimal Symbol	Digit Grouping Symbol	Digit Grouping	Positive Currency Format	Negative Currency Format	Negative Number Format
	(Italy)	(comma)		789			
Japanese	Japanese (Japan)	. (period)	, (comma)	123,456, 789	#123	-#123	-123
Korean	Korean (Korea)	. (period)	, (comma)	123,456, 789	#123	-#123	-123
Portuguese	Portuguese (Brazil)	, (comma)	. (period)	123,456, 789	# 123	-# 123	-123
Russian	Russian (Russia)	, (comma)	Space represented by blank in the product	123,456, 789	123#	-123#	-123
Spanish	Spanish (Spain)	, (comma)	. (period)	123,456, 789	123 #	-123 #	-123

Proxy Tab

Use the **Proxy** tab to:

- Prevent assigning proxies (**Do not allow Proxies**)

> **Note:** The **Do not allow Proxies** option is only available for the **Company Administrator** (and in **Admin** mode).

- Add multiple proxies (**My Proxy** tab: **Users who can act as my Proxy**)
- See the list of users who can act as your proxy (**My Proxy** tab: **Users who can act as my Proxy**)
- See the list of users who you act as their proxy (**I am Proxy** tab: **Users I can act as their Proxy**)
- See the history of proxy login (**Proxy Login History** tab)

You can select/designate more than one proxy user.

You can be a proxy for multiple people, and you can designate more than one user as your proxy.

Proxy users can be granted permission to access another user's account to complete tasks and perform other functions on that person's behalf. When another person signs in as your proxy user, that person will have access to all the records and functions that you do.

When you designate another user as your proxy, the user will have access to all:

- The records that you have generated
- The functions that you perform

When you designate another user as your proxy, the user will not be able to change your Preference settings and the Audit logs reflect the actions taken by a proxy user as "on behalf of" the original user.

You can limit the period in which the proxy user will have access to your account by specifying a start and end date or leave their access active indefinitely.

Proxy users who are active (Status: **Active**) receive email notification of tasks to perform as proxy. This applies during the time specified time period, using the Start Date/Time and End Date/Time.

> **Note**: If the proxy user must receive task notifications immediately, ask the proxy user to ensure that the Send notifications in a single daily digest checkbox is not selected. See ***Selecting Email Subscription Options*** (on page 47) on the **Preferences** window, **More** tab.

Do not allow Proxies

Only Site/Company Administrators, Company users, and Partner users are permitted to select the **Do not allow Proxies** option.

> **Note:** This option is read-only in the user's **Preferences** window.

Users can add proxy users in their **Preferences** window only if the Site/Company Administrator has not checked the **Do not allow Proxies** option in the **Proxy** tab of Edit User window.

The **Proxy** tab contains the following tabs:

- **My Proxy** tab

  This tab enables you to determine the users who can act as your proxy (**Users who can act as my Proxy**). This tab of the **Proxy** tab lists the users who can act as your proxy and allows you to add, adjust the settings, remove proxies, and view the proxy login history.

  If enabled by the Administrator, Partner Users can add Owner Company Users as proxy users.

  If you have access to more than one Company and want to assign a proxy for yourself in those companies, you need to go into each Company and set the proxy user (select the Company, select your user name, select Preferences, and then select Proxy).

  The topics that follow describe available user preference configuration settings for each tab.
- **I am Proxy** tab

  This tab enables you to determine who you can be a proxy for (**Users I can act as their Proxy**).
- **Proxy Login History** tab

  This tab enables you to see a history of all proxy logins.

Choosing a Proxy User

Add (plus "+" icon)

If the **Do not allow Proxies** option is selected by your Company Administrators, this option is not available for you to use.

If the **Do not allow Proxies** option is not selected by your Company Administrators, you can use this option to grant proxy access to other users. To add a proxy, click **Add** and follow the prompts.

> **Note:** Your Company Administrator can assign other users to act as proxies to your account if you are unable to do so.

Settings

If the **Do not allow Proxies** option is selected by your Company Administrators, this option is not available for you to use.

If the **Do not allow Proxies** option is not selected by your Company Administrators, you can use this option to select an existing proxy and change the user settings of your proxy, such as start and end date/time. To change the user settings of your proxy, click **Settings** and follow the prompts.

The system sets the values in the time-related fields base on the user's preferred data and time formats.

If you do not specify a start or end date, the proxy user can access your account immediately and their access privileges will not expire.

You can select **Active** to activate your proxy's access. To disable your proxy's access, select **Inactive**.

Remove

You can use this option to remove a selected proxy. To remove a user as your proxy, select the proxy from the list and click **Remove**.

Proxy Login History

Use this option to view the following information about your proxies:

- Name
- Company
- Login Date
- Logout Date

The last login information appears on top.

Users I can act as their Proxy

If the Company Administrator has designated you as a proxy for another user, your user name is listed under Users I can act as their Proxy field.

> **Note:** As a proxy of a user, you have all the permissions that have been granted to that user except that you cannot change the user's original Preference settings even if the user has Administration permissions.

More Tab

Use the **More** tab to manage company settings such as:

- Viewer Options
  - Default Viewer
- Viewer Exceptions
  - Always use Native
  - Always use Unifier

Choosing a Viewer Option

The following setting is maintained in the **More** tab of the **Preferences** window.

The File Viewer option determines how the system displays files (such as documents or drawings) that are attached to business processes or stored in the **Document Manager** and opened from within the system.

You can choose a default viewer, which will be used to open most file types. You can also specify exceptions to this; for example, you may choose Unifier Viewer as the default viewer, which will be used to open most file types, but then choose to open a few file types such as drawing files and image files using the native software applications that reside on the user's desktop machine. For more information, see ***File Viewer Option***.

To select a File Viewer option:

1) Go to the **More** tab in the **Preferences** window.
2) From the **Default Viewer** drop-down list, select one of the following options:
   - **Native:** Select this option to open documents in their native software applications. To use this option to view files, you must have the applicable native software application installed on your computer or your Company Administrator must have enabled Office 365 integration for use with Microsoft 365 (Office for the web) applications.

     Note: The native software application and Microsoft 365 do not display the document graphical markups, but Unifier Essentials displays the document graphical markups automatically, using the Unifier Viewer.

   - **Unifier Viewer:** Select this option to open documents in the system-provided Viewer. For more information on working with documents, see **Creating and Managing Documents** in the *Unifier Essentials Managers Reference Guide*.

     Note: If you select **Unifier Viewer**, the document opens in read-only view, but it supports adding graphical markups and text comments (for example, in attachments to business process and other records, or in files in the **Document Manager**).

3) When finished, click **Apply** and then **OK**.

Setting Viewer Exceptions

The **Viewer Exceptions** section of the **More** tab lets you specify exceptions to the default viewer of your choice.

Example

If you selected **Unifier Viewer** as the default viewer and want **Native** to show a particular extension and not the **Unifier Viewer**, enter the extension in the **Always use Native** field.

If you selected **Native** as the default viewer and want **Unifier Viewer** to show a particular extension and not your Native software, enter the extension in the **Always use Unifier** field.

Notes:

- Omit the period before the extension.
- Separate multiple extensions by a semicolon, with no space in between.

Queries

You will be using queries to extract data from the database for reports and data pickers and to set up auto-creation with creator elements.

A query is a data mining tool—a method for retrieving information from a database. A query filters the information returned from the database according to restrictions or conditions you specify. Unifier Essentials queries can:

- Filter or narrow the data being retrieved for use in reports and manager sheets.
- Set up conditions or triggers to make something happen automatically.
- Filter or narrow the data being retrieved for use in a data picker element.

In This Section

Using Formulas or Conditions in Queries

For queries, you can evaluate the data before retrieving it from the database to determine whether to include the value in the report, manager sheet, or data picker, or to spawn an auto-creation. To evaluate the data, you can use a formula or a condition.

In formulas, multiple fields can be calculated to arrive at a certain value that the data must meet before it will be used. The value can be one that you enter, or a value from another field.

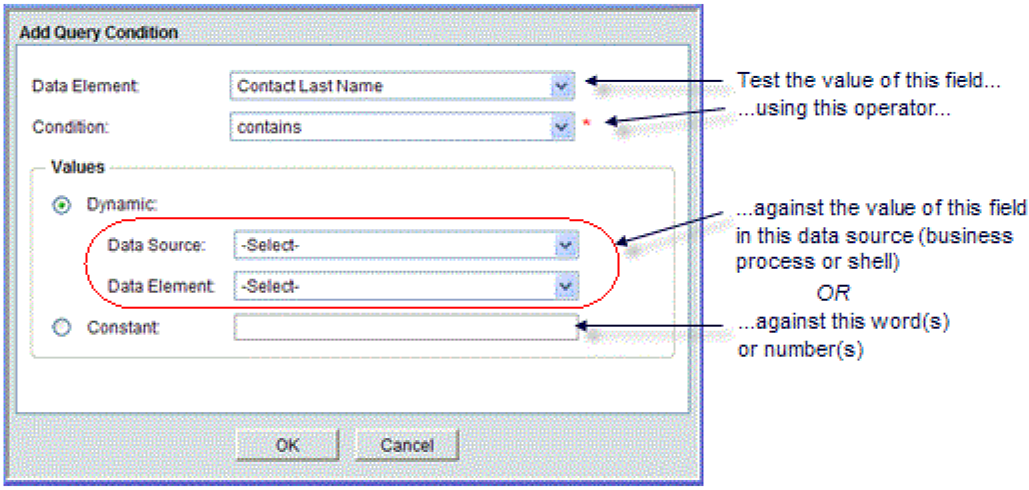
You can include formulas in conditions.

In the **Condition** field, select the condition the value in the field must meet.

The following explains the formulas that you can use in a query.

Field Value Comparison

The formula for field value comparison produces data that meets a field value (string or numeric) from the form of a business process or a shell in a hierarchy, or a constant. This is then used to populate a data picker.

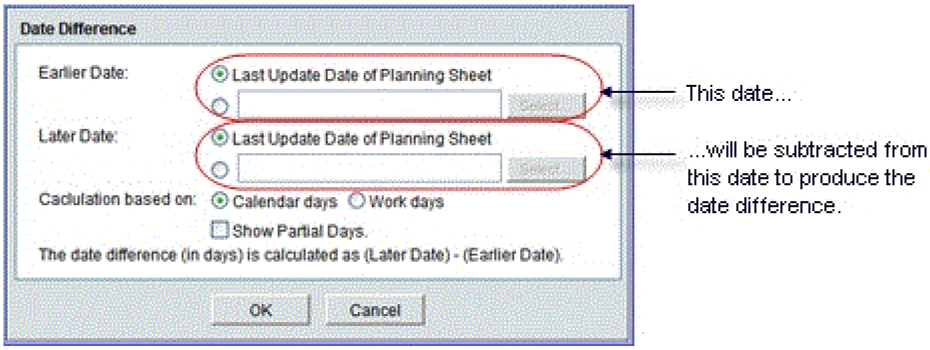


Date Plus or Minus

The formula for date adds or subtracts a value to or from a date.

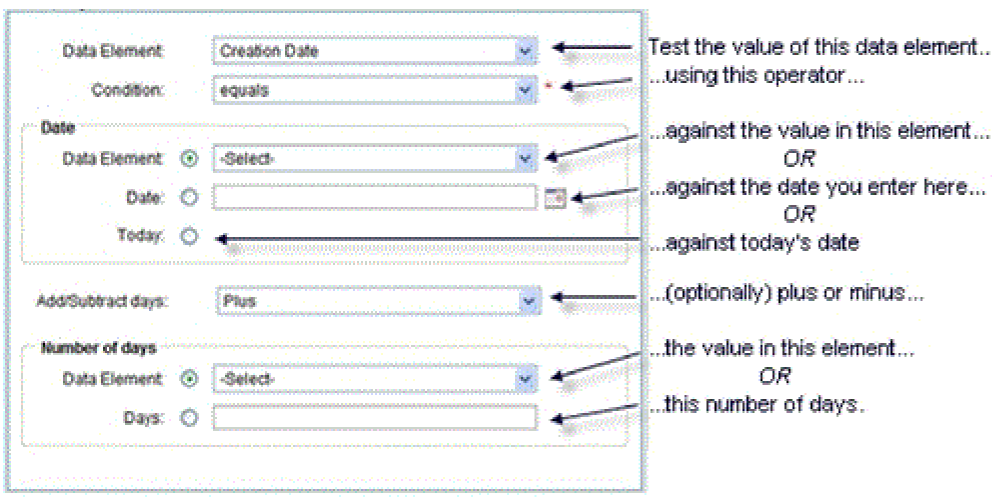
Date Difference

The formula for date difference subtracts one date from another to give you the number of days between the dates.



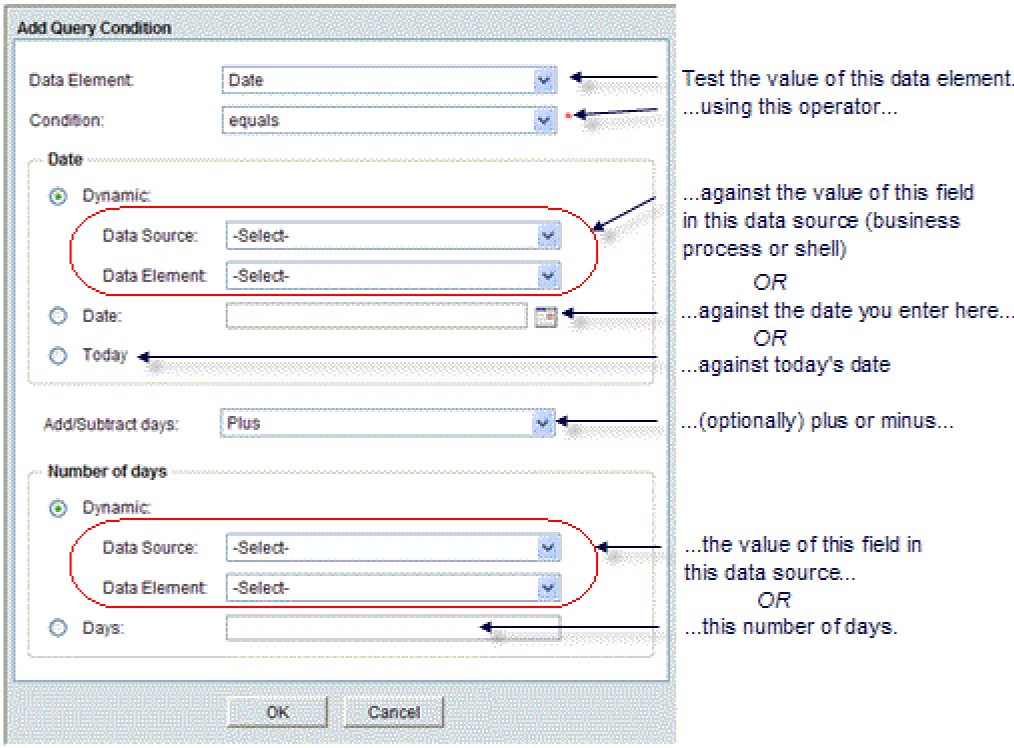
Compare Date Fields

You can also compare date fields as part of a query.



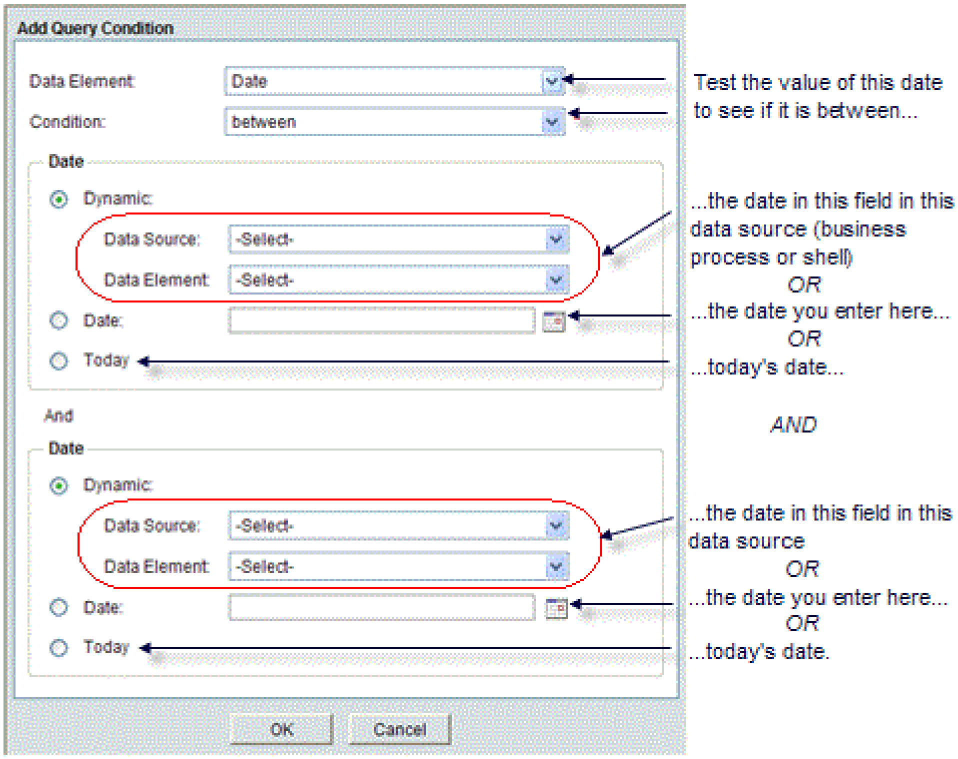
Dynamic Date Value

You can compare a date field value with a date field from the form of a business process or a shell in a hierarchy, a specific date, or today's date, and also add or subtract days to the result. This is then used to populate a data picker.



Between Dates

You can compare a date field value to see if it falls between two dates. This is then used to populate a data picker.



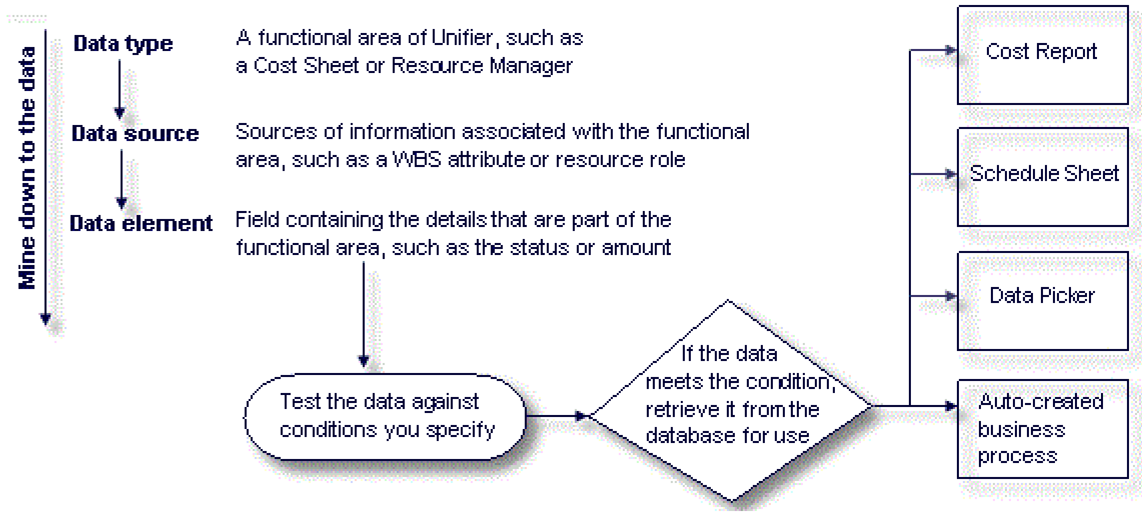
How Queries Work

The way queries work in Unifier Essentials is as follows:

- You mine down to the information you want by choosing an element (field) in the database on which to base the query.
- You test the data against conditions and values that you specify.

  A condition is a state or restriction that the value in the data element (field) must meet. A condition of the value might be that it must be equal to a certain number (for example, 10) or that it must contain a certain string of letters (such as "due date of").

- When (or if) the data meets the condition you specify, the system retrieves it from the database for use in a report, manager sheet, auto-creation, data picker, and so on.



Assignee Filter Query Condition

When you are setting up a business process, you can filter the condition for the *assignee* according to:

- Contains
- Does not contain
- Exists in
- Does not exist in
- Equals
- Does not equal
- is empty
- is not empty

The following is an example of query evaluation. The workflow setup follows these policies for selecting users.

Assignee	Query Field (Role as defined in the User Attribute Form)
A	Approver
B	Reviewer
C	Controller-Approver
D	Controller
E	Reviewer-Submitter
F	Submitter

Assignee	Query Field (Role as defined in the User Attribute Form)
G	Approver

The following shows examples with condition/operator:

Condition/Operator	Business Process Form (Field value) Example of the data source used.	Filtered List of Assignees
exists in	Controller-Approver	A, C, D, G
	Reviewer	B
does not exist in	Controller	A, B, C, E, F, G

Note: If the workflow setup has any of the new operators, the list of *assignees* that the user sees at runtime retains the stated query parameters.

The following shows examples with value, condition/operator, and result:

Value 1	Condition/Operator	Value 2	Result
ABC	exists in	ABC, BCD, CDE	True
XYZ	exists in	ABC, BCD, CDE	False
ABC	does not exist in	ABC, BCD, CDE	False
XYZ	does not exist in	ABC, BCD, CDE	True
ABC, BCD, CDE	contains	ABC	True
ABC, BCD, CDE	contains	XYZ	False
ABC, BCD, CDE	does not contain	ABC	False
ABC, BCD, CDE	does not contain	XYZ	True

Query Based Data Element (QBDE)

A Query Based Data Element (QBDE) lets you view data from the Upper Form or Detail Form of a Business Process (BP). QBDE also lets you view data from:

- Other BPs
- Sheets
- Cash Flow

The QBDEs are based on the “SYS Numeric Query Based” Data Definition (DD), and the query for these QBDEs is set in the Business Process Configuration setup. For more information, see **Configure a Query for a Query Based Data Element on a BP** in the *Unifier Essentials Modules Setup Administration Guide*.

In addition to the Web interface (Unifier Essentials application in the browser), the system evaluates QBDE in the following areas:

- CSV import for record creation
- CSV import for Line Item creation
- Web Service methods for record creation along with Line items
- Web Service methods for Line Item creation
- Web Service methods for record updates
- Bulk Edit
- Bulk Update
- Creating BP records using BP

Notes:

- Because the system evaluates QBDEs in a random order, Oracle recommends that you do not create a QBDE that uses a formula that references another QBDE.
- DEs that have been defined as a QBDE trigger element should not be evaluated as part of QBDE calculation.
- Oracle recommends that you do not use a Required field to create a query that uses a Data Picker, Cost Breakdown Structure (CBS) Picker, or Fund Breakdown Structure (FBS) Picker. If the data entered in a data element (DE) field with a Required condition is *cleared*, the system bases the query on the previous value of the field.
- When using QBDE, be aware that query elements are rounded off to use two decimal places, even if the Base Currency and various defined currency fields are different.

Evaluating Query Setups of Data Picker Data Elements

The system supports many types of Data Picker DEs. The Administrator can set up Query conditions on these Data Picker DEs to filter the results. When a Data Picker DE is launched in the Web interface, the system runs the query and displays the records based on the queries defined. The system evaluates the data picker query conditions in the following areas, as well:

- CSV import for record creation
- CSV import for Line Item creation
- Web Service methods for record creation along with Line items
- Web Service methods for Line Item creation
- Web Service methods for record updates

The following is a list of the supported Data Pickers:

- BP Data Picker
- Shell Data Picker
- User Data Picker

> **Note:** If a BP Data Picker (BP Picker) or any Data Picker is selected as a trigger element for QBDE and the picker value is automatically populated (auto populated) instead of manually entered, the QBDE element will not be evaluated.

Creating a Record from the Query Based Tab

When creating a record from the Query Based tab of another BP (that auto-populates data to the record being created), the Data Element (DE) of type “SYS Numeric Query Based” Data Definition (any DE of this type) *is not updated*, unless the user manually changes the trigger element.

If a query condition involves only constant dates, it is not converted based on the user's time zone.

Workspaces

In Unifier Essentials, a typical organization has the following configuration:

Organization

- Region or District
    - Campus or Site
        - Building
            - Project

In this configuration, an organization is considered a shell (a single instance shell) that contains other shells. The following describes the various workspaces available in the system that correspond to your organization's configuration.

Home

Access this workspace by clicking the home icon (). This workspace is system-generated. You cannot modify the label or the contents of the Home workspace, and you cannot change the modes of operation (Administrator or User).

Company Workspace

This company-level, or organization-level, workspace is a system-generated workspace. Although you can modify the label, you might want to retain the "Company Workspace" label because this specific terminology is used throughout documentation and training materials to refer to a workspace in which you can access your company or organization modules. In this workspace, you can change the modes of operation for an Administrator or a User.

Organization Single Instance Shell

This workspace is a container (shell) in which you can organize entities such as Projects or Buildings. This is a system-generated workspace, and you can modify the label. Consider changing the label of this workspace to reflect the name of your organization.

Region/District

This workspace is created by the user. You have the option not to create this workspace. If you are organizing your buildings to include a Region or District in the hierarchy, you can list them in this workspace. In this workspace, you can change the modes of operation for an Administrator or a User.

Site/Campus

This workspace is created by the user. You have the option not to create this workspace. If you are organizing your buildings to include a Site or Campus in the hierarchy, you can list them in this workspace. If you have specified a Region/District, every Site/Campus will go under a Region/District. In this workspace you can change the modes of operation for an Administrator or a User.

Buildings

This workspace is required and must be created by the user. This workspace lists the buildings where projects are in progress. In addition to the buildings, you can include parking structures, outdoor properties, and other structures in this workspace where projects are also in progress.

The following table provides a summary:

Workspace Name	System-generated	User-created	Modes	Notes
Home	Yes	No	Not applicable	The label cannot be modified by users.
Company Workspace	Yes	No	User & Admin	The label can be modified, but keeping the original name improves clarity when reviewing documentation and training. This workspace is a Company-level or Organization-level workspace.
Organization	Yes	No	Not applicable	This is the organization "single instance shell." Consider changing the label to your organization name.
Region/District	No	Yes	User & Admin	The label can be renamed. This is not a mandatory workspace.
Site/Campus	No	Yes	User & Admin	The label can be renamed. This is not a mandatory workspace.

Workspace Name	System-generated	User-created	Modes	Notes
Building	No	Yes	User & Admin	The label can be renamed. This is a required workspace.
Project	No	Yes	User & Admin	The label can be modified but is not recommended. This is a required workspace.
Program	No	Yes	User & Admin	This is an optional workspace.
Program List	No	Yes	User & Admin	This is an optional workspace.

For information on setting up a user-created workspace, see **Setting up Shells** in the *Unifier Essentials Modules Administration Guide*.

In This Section

Program and Program List Workspaces

The system contains two optional workspaces, **Program** and **Program List**. These workspaces are available through your Organization tab; they are not available at the project level.

- **Program** is an organization-level workspace that exists outside of the standard shell hierarchy for buildings and projects. The Program workspace lets you group and track individual project shells that are related in some way. For example, you might want to track a Program made up of projects that are related to sustainability or that are supported by a certain type of funding, or you might want to track capital-based projects versus expense-based projects. You can assign a new project to a Program when you create the project, and you can add and remove existing projects.

By grouping projects through the Program workspace, you can generate reports and display dashboards that summarize cost- and progress-related information for the associated projects. The system includes two custom reports, Program Cost Sheet and Program Project Summary, and a Program Summary dashboard to facilitate these summaries. The Program Summary dashboard displays budget distribution, cost summaries, phase summaries, and project percentage completion summaries for all projects within the specified program.

- **Program List** is also an organization-level workspace. This workspace provides a log of all Programs that your organization has created.

> **Note:** A project can only be part of one Program; however, you can move a project from one Program to another.

To add a project to a Program as you create the project:

When you complete the Project Request business process form, enter the applicable name and number in the **Program** field of the **Key Information** section.

To add an existing project to a Program:

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Information**, and then select **General**.
3) Open the Project Configuration business process and click **Edit**.
4) In the **General Settings** section, select a **Program**.
5) Click **Submit**.

To view the Program Summary dashboard:

1) Go to your Organization tab and switch to **User** mode.
2) Select the **Workspaces** tab.
3) From the **View** list, select **Program**.
4) Open the applicable Program.

To view the Program List dashboard:

1) Go to your Organization tab and switch to **User** mode.
2) Select the **Workspaces** tab.
3) From the **View** list, select **Program List**.
4) Open the applicable Program.

Working with Shells and Projects

Shells represent your project collaboration workspace, for example:

- Capital Projects
- Maintenance Projects
- Business Portfolios
- Project Delivery Management

With shells, you can show project relationships and hierarchies to represent a real-world physical or organizational structure more accurately. In the following example, indentation is used to represent levels in a hierarchy. In this example, a Building shell can be a sub-shell within a Property or a Region.

- Region
  - Properties
    - Buildings
  - Buildings
    - Projects

You can create multiple templates from which you can centrally manage large numbers of shells. The shells you create can have their own business processes, cost worksheets, reports, dashboards, document repositories, and users and groups. You can organize shells into hierarchies that let you pull data from a current shell and any of its subordinate shells. Working together, these features give you visibility into, and control of, your projects.

A Unifier Essentials project is a collaboration space that lets project users collaborate on and coordinate the execution of a project. As a Unifier Essentials user, you may be part of a sponsor company or a partner company (or possibly both). Sponsor companies can commission and administer projects. Partner, or member, companies (for example, subcontractors and vendors) work with sponsor companies to complete projects.

> **Note:** User access and permission levels for all functions are controlled by the Company Administrator. If you have access-related questions, contact your Company Administrator.

Shells allow users to manage different modules. Projects are also shells that are predefined in the system. Administrators can later create one or more instances under each shell type. Each instance can have its own business process, cost manager, reporting module, or other modules as needed.

The following explains how to work with Unifier Essentials projects.

Note: The instructions and information presented in the system documentation is based on an out-of-the-box (OOTB) setup and before being customized by the user.

In This Section

Using Projects

Your project can have one of four statuses:

- **Active**: A live, in-progress project.
- **On-Hold**: The initial project status. On-Hold projects are listed on the projects log, but you cannot work with them.
- **View-Only**: View-Only projects can be viewed, printed, exported, and included in reports. You cannot modify any data in View-Only projects. This allows you to view past projects without allowing changes to these projects.
- **Inactive**: Used to suspend project usage. Inactive projects are visible to Administrators, but not to end users. Only System and Project Administrators (users with Modify Status rights) can reactivate the project.

Note: If automatic status update is enabled on a project, the status of the project can change from Active to an inactive status (On-Hold, View-Only, Inactive). The change of status is set up by the Administrator, and is based on defined triggering conditions. For example, if a project is close to exceeding its funding, it might make sense to put it On-Hold while funding matters are discussed. Your project administrator must manually change the status back to Active when you are ready to restart the project.

The Project Administrator will receive email notification when the status of a project changes. The change of project status could occur due to a manual change, bulk update, through Web Services or a CSV file, or through automatic update.

Working with the Project Summary

The project summary provides a snapshot of the overall project. You can configure what information is displayed in your project summary. There are two available views of the project summary:

Summary - Standard View: The standard view of the project summary displays an overview of the project:

- Project name and number, project administrator, and the number of people on the project.
- Project schedule data, including schedule tracking information.
- Cost data relative to expenses incurred on the project to date from the project cost sheet. Total amounts are displayed and rounded to the nearest integer. "Invalid" displays for any entry that contains an invalid entry in a Cost Manager formula.
- Current tasks and their progress.
- Project-level business process records. Click a business process on the list to display the number of records that exist for that business process.
- From the **View By** selection list, choose **Status** (displays the total number of project records for each business process and the current status) or **Originating Company** (displays the total number of project records originated per company, listed by company short name; applicable if your partner companies can create business processes for the project).

Summary - User View: You can customize the project summary to display virtually any reportable project-related information in table or graphical format. The summary information is pulled from summary-type, user-defined reports or from preconfigured standard data-type reports.

You can drill down to the respective log by clicking a hyperlink from a summary report block.

To access the project summary:

1) Open a project and click **Summary** in the Navigator.
2) Click the **View** menu, and choose **Standard** to view the standard view or **User** to view the user-defined view.
3) Click a link to jump directly to the respective log.

To print a project summary:

1) Open a project and click **Summary** in the Navigator. You can print both the user view and the standard view.
2) From the File menu, click **Print Preview**. The preview window of the summary opens.
3) Click the **Print** icon in the upper-right corner of the window.

Configure Your Project Summary

To help you keep track of the information that is most useful to you, you can customize the information that is displayed in the Project Summary window. Each part of the summary page is called a block. The data shown in a block can be in table form, a bar graph, or a pie chart. The summary page displays blocks on the right or the left.

You can add, edit, view, or delete summary reports as described below. You can customize how the summary report data is arranged in the Project Summary window, including displaying it on the left or right column, arranging the order of the display, and displaying the information as a table, bar chart, or pie chart.

The data that is displayed in this view is generated from summary-type, user-defined reports. Each block represents one report.

> **Note:** The system displays the **Tasks**, **Notifications**, and **Drafts** nodes, in the respective Company Workspace and Project/Shell, based on the

deployment of your user mode navigators.

Available project-level standard reports

Name	Drill down to	Default
<BP Name> Count by Status	BP Log	
<BP Name>% by Status	BP Log	
<BP Name> Count by Company	BP Log	
<BP Name>% by Company	BP Log	
<BP Name> Count by User	BP Log	
<BP Name>% by Creator User	BP Log	
<BP Name> - Tasks by User	Project, and then select Tasks	
<BP Name> - Tasks All Users	Project, and then select Tasks	
Record Count per BP (for current user)	BP Log based on which BP link was clicked	Yes
Record% per BP	BP Log based on which BP link was clicked	
All Users (by company)	Project, select Project Information, and then select Project Directory	
Logged in Users (by company)	Project, select Project Information, and then select Project Directory	Yes
Current User Task Count	Project, and then select Tasks	Yes
All User Task Count	No drill down	
Total Documents	Drill down to Document Manager	Yes

To add reports to the user view:

1) Create summary-type reports that include the information that you want to display in the summary.
2) Open a project and click **Summary** in the Navigator. The Summary window opens.
3) Click the **View** menu and choose **User**.

The initial reports included in the summary are displayed in table format. You have the option to modify how these reports display, remove them from the summary view, or add other summary reports.

4) From the **Edit** menu, choose one of the following:
   - **Left Column**: To add information to the left side of the window
   - **Right Column**: To add information to the right side of the window

   The Left Column Blocks or Right Column Blocks window opens.
5) Do one of the following:
   - To add a user-defined summary report, click **Add Custom**. The Custom Summary Block window opens. Complete the window and click **OK**.
   - To add a preconfigured, standard data-type report, click **Add Standard**. The Standard Summary Block window opens. Complete the window and click **OK**.
6) Use the information in the first table below to complete the fields in the Add Custom window.
7) Use the information in the second table below to complete the fields in the Add Standard window.
8) Click **Close**. The Project Summary - User View window will update to include the new report.

In this field	Do this
Report Name	Click the Select button. The User-Defined Reports window opens, listing the available summary reports. Select a report from the list, and click the Open button. (If the list is long, you may click the Find button and enter search criteria to help locate a specific report.) Note: Note: Reports that are already used in the summary page are shown with a check mark. You can use a report more than once. For example, you might want to include the same report in both table and pie chart formats.
Description	This is populated automatically with the report description, if one exists.
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.
Display Type	Choose to show the data as a bar chart, pie chart, or table format.
Show Result	Choose one of the following: • **Actual Value:** Shows the actual value of what is being reported (number of records for a particular BP type, and so on).

In this field	Do this
	▶ **Percent distribution of total:** Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, and so on).
Show Total	Select this checkbox if you want to display the total value of the data. This will vary, depending on what data is used in the report. For example, it may include the total number of records, total currency amount, and so on.
Report Name	This field will auto-populate with the selection from the Report On field.
Data Type	Choose a standard data type to add to the summary. Choices include: ▶ Business Process ▶ Document Management ▶ Active Task Information ▶ Users ▶ List of project business processes
Report On	The selection list is dependent on what is chosen from Data Type. Choose from the selection list. The Report Name field will auto-populate with the standard report.
Block Title	This will appear over the data on the summary page. By default, the field will show the report name, but is editable.
Display Type	Choose to show the data as a bar chart, pie chart, or table format.
Show Result	Choose one of the following: ▶ **Actual Value:** Shows the actual value of what is being reported (number of records for a particular BP type, and so on). ▶ **Percent distribution of total:** Calculates the value as a percentage of the total (the percentage of total records to which a BP type corresponds, and so on).
Show Total	Select this checkbox if you want to display the total value of the data. This will vary, depending on what data is used in the

In this field	Do this
	report. For example, it may include the total number of records, total currency amount, and so on.

To move or delete blocks on the Project Summary - User View:

1) Open the Project Summary - User View.
2) From the Edit menu, choose one of the following:
   - **Left Column:** To add information to the left side of the window
   - **Right Column:** To add information to the right side of the window

   The Blocks window opens. Blocks are listed in the order in which they appear on the page.
3) To move a block, select it and click **Move Up** or **Move Down**.
4) To delete a block, select it and click **Delete**.

To change the display type, title, or other block property:

Select the block and click **Open**. Make changes as necessary and click **OK**.

Managing Project Alerts

You can create customized alerts to alert you to a condition or event in the system that you specify. For example, you might set up an alert that will send you an email or Mailbox message letting you know that a fund amount on the funding sheet has reached a certain level.

Alerts are created by creating an alert-type user-defined report. For more information about user-defined report data types, see ***Project Level User Defined Reports***.

To create an alert:

1) Create an alert report in user-defined reports.
2) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
3) Click **New**. The Alert window opens. Complete the window as described in the table below.
4) Click **OK** to close the Alert window.

In this field:	Do this:
Report Name	Click the Select button. The list of user-defined alert reports for the project opens. Select a report from the list, and click the Open button. (If the list is long, you may click the Find button and enter search criteria to help locate a specific report.) **Note:** Reports that are already used to create an alert are shown with a check mark. You can create more than one alert

In this field:	Do this:
	for each report.
Description	This is populated automatically with the report description, if one exists.
Alert Title	This will appear as the title of the alert in the log and on the alert sent. By default, the field will show the report name, but this is editable.
Frequency	Choose the frequency that you want the alert to be sent when the trigger condition is met: Never: Alerts will not be sent. Hourly: Alerts will be sent every hour, at about 20 minutes past the hour. Daily: Alerts will be sent daily at about 2:20 a.m. Weekly: Alerts will be sent on Mondays at about 2:20 a.m. Monthly: Alerts will be sent on the first day of the month, about 2:20 a.m. Times may vary somewhat. The times noted above refer to server time, that is, the time according to the Unifier Essentials server being used. (Servers operate on Pacific Time Zone.) **Note:** If you choose any frequency other than Never, you must specify a method and message.
Method	You may select one or both of the following methods to be notified of the alert: Email (the email on your user profile will be used) or Mailbox.
Message	Type a message that you want to be included in the alert. Remember that this is an alert that only you will see, so enter as much or as little detail as you need.

To edit alerts:

1) Open a project and click **Alerts** on the Navigator. The Alerts log opens.
2) Select an alert and click **Open**. The Alert window opens.
3) Make changes to the alert as needed and click **OK**.

To delete an alert:

Open a project and click **Alerts** on the Navigator. The Alerts log opens. Select an alert and click **Delete**.

Working with Mailbox (Projects)

The *project* **Mailbox** is an internal email feature that allows *project team members* to communicate with each other and maintain a record of the communications. The *project* **Mailbox** interface is similar in functionality to common email programs such as Microsoft Outlook. The *project* **Mailbox** supports file attachments and emails can be sent between *project team members* and to external email addresses.

> **Note**: The external email cannot be sent directly to the *project* **Mailbox**.

A copy of every mailbox communication is saved in a central folder controlled by the *project administrator*. These communications become part of the *project* record. The *project* or company administrators must grant users permission to access the *project* **Mailbox** folder.

Depending on permissions, users can view all messages or only those in which they participated (sent or received). Permission can also be granted to delete items in the *project* **Mailbox** folder. Once deleted, the communications are not recoverable.

> **Note**: Users who sent or received the deleted message may still retain copies of these messages in their own **Inbox** or **Sent** folder.

You can link the messages in the *project* **Mailbox** to specific business process records.

View and Find Mailbox Messages

The Mailbox feature is project specific, and the full functionality is accessed at the project level. A cross-project listing of your Inbox and Sent items can also be accessed in the Mailbox node directly under Home.

To access project Mailbox:

1) Go to the project tab and switch to **User** mode.
2) Click **Mailbox** in the left Navigator. The Mailbox folders expand:
   - **Drafts:** Displays Mailbox messages that you have drafted but not yet sent.
   - **Inbox:** Displays messages sent to you.
   - **Sent Items:** Displays messages that you have sent.
   - **Deleted Items:** Displays items that you have deleted from one of the other folders.
   - **Project Mailbox :** Stores copies of all Mailbox messages sent between project team members. Access to this folder must be granted through permission settings.

To view all your Mailbox messages across projects:

1) Go to the Home workspace.
2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.

3) To open a listed message, select it from the list and click **Open**. You will be directed to the Project Mailbox Inbox or Sent folder containing the message, and the message will open.

To search for a specific Mailbox message across projects:

1) Go to the Home workspace.
2) Click **Mailbox** in the left Navigator. All messages residing in all project Mailbox Inbox and Sent folders are listed.
3) Click the **Find** button.
4) Enter search criteria in the Subject Containing or Message Containing fields in the upper portion of the log.
5) Click **Search**. The log will list the messages meeting the search criteria entered.

Send and Receive Mailbox Messages

Mailbox functionality is similar to common email programs. In Mailbox, you can attach files, format text, flag the message, compose and save a draft of your response without sending it, and preview your message in a browser.

You can correspond with your project team members through Mailbox, and send Mailbox to external email addresses. External email users cannot send email directly to Mailbox.

> **Note:** Mailbox messages can be linked directly to related business process records. For information about linking mailbox messages to a record, refer to the *Unifier Essentials Business Processes Reference Guide*.

To send a Mailbox message:

1) Go to the project tab and switch to **User** mode.
2) Select any Mailbox folder.
3) Click **New**. A message window opens.
4) Choose the recipients of the Mailbox message by doing any of the following:
   - Click **To** to select the primary recipients. The User/Group picker opens displaying project users. Select recipients from the **Select Users** list, and click **Add**. Click **OK** to close the picker.
   - To send a copy to another recipient, click **Cc**, and choose the recipients from the User/Group picker.
   - To send a copy to an external email address, enter the address in the External Cc field. Separate multiple external addresses with a semicolon (;). The recipient will see Unifier Essentials Notification in the From field, and will not be able to reply directly.
   - To send a blind copy (Bcc), click the **View** menu and select **Bcc Fields**. The Bcc button and External Bcc field become available on the Mailbox message window.
5) Type the subject of the message in the Subject field.

6) Type the body of the message in the text field.
7) Click **Send** to send the message.

To view or respond to a Mailbox message

1) Access Mailbox by doing one of the following:
   - Open a project and switch to **User** mode. In the left Navigator, select the **Mailbox Inbox** folder. The Inbox lists all messages that have been sent to you. Unread messages are shown in bold text.
   - Go to the Home workspace. In the left Navigator, select **Mailbox**. All sent and received Mailbox messages across projects are listed. Unread messages are in bold text.
2) Double-click a message to view it. The message opens.
3) To respond to the message, do one of the following:
   - To send a reply to the sender, click **Reply**.
   - To send a reply to the sender and other recipients of the original message, click **Reply to All**.
   - To forward the message to another recipient, click **Forward**.

> **Note**: Any file attachments will remain on forwarded messages.

4) Type your response and click **Send**.

> **Note**: For Project Mailbox Replies, the **From** field of the external email received does not indicate the corresponding project mailbox email address; however, after you reply, the **To** field will contain the project mailbox email address, auto-populated.

To attach files to a Mailbox message:

1) Open the Mailbox message.
2) Click **Attach** and choose one of the following:
   - **My Computer:** Attaches the file from your local system. The procedure is the same as for uploading files to the Document Manager.
   - **Unifier Folder:** Attaches 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**.

> **Note**: Folders are not attached. The contents of selected folders are attached in a flat list. Documents with duplicate file names will not attach.

3) Click **OK** to add the file, and click **OK** to close the General Comments window.

> **Note**: The system allows you to embed only one image (file size must be equal or less than 1MB) in a single email. Use the attachment feature to send an image with a file size greater than 1MB, or to send multiple images.

To flag a Mailbox message for follow-up:

1) Open an existing message, or create a new message.

   If you want to flag a message that you are replying to or forwarding, open the message, and click **Reply**, **Reply All** or **Forward**.

1) Click the **Flag for Follow-Up** button. The Flag for Follow-Up window opens.
2) In the **Flag to** field, choose an action, such as "call," or "for your information."
3) Click **OK**. The flag text appears at the top of the message. A red flag symbol will also display next to the message in the log. (You may need to refresh the log to see the flag.)
4) If this is an existing message that you are flagging for yourself, you can simply close the message. If you are sending the message to someone else, add the recipients and send the message.

To remove a Mailbox flag:

Click the **Flag for Follow up** button, and then click **Clear Flag**.

To format Mailbox text:

1) Open the Mailbox message.
2) Select the text you want to format within the body of the message.
3) On the Formatting toolbar, choose the formatting to apply to the text.

To spell check Mailbox text:

1) When you are finished composing a Mailbox message, click **Spelling** on the toolbar of the message. The body text of the message is checked.
2) Make spelling corrections as necessary and click **OK**.

To print a Mailbox message:

1) Open the Mailbox message.
2) Click the **Print** button.

To print several Mailbox messages from the Mailbox log:

1) Navigate to a Mailbox log.
2) Select the Mailbox records that you want to print.
3) Click the **Print** button.

To search for a Mailbox message

1) In the Navigator, select one of the Mailbox folders.
2) From the toolbar, click the **Find** button. The Find box expands above the log.
3) Do any of the following:
   - To search by the recipient (To field), click the **Select** button and choose the user from the User/Group picker.
   - To search by subject, enter a word or phrase in the **Subject Containing** field (partial entries are acceptable).
   - To search by message content, enter a word or phrase in **Message Containing**.
   - You can further refine the search by clicking the Items that are: drop-down list and choosing Read or Unread.
4) Click **Search**. The messages meeting your search criteria will be listed in the log.

To delete Mailbox messages:

1) Do one of the following:
   - From a Mailbox log, select the message and click **Delete**.
   - From within a Mailbox message, click **Delete** on the toolbar.

   The message is moved to the project's Deleted Items folder.
2) To permanently delete a message, select it from the Deleted Items folder and click **Delete**. Click **Yes** to confirm that you are permanently deleting the message.

> **Note**: When you delete a message from your account, a copy of the message remains in the central project record: the Project Mailbox folder. Messages deleted from the Project Mailbox folder are permanently deleted.

Link Mailbox Messages to Business Process Records

Mailbox messages can be linked directly to BP records through the Linked Mailbox link at the bottom of the BP form. For information about linking mailbox messages to a record, refer to the *Unifier Essentials Business Processes Reference Guide*.

> **Note:** This option is available only in BPs that have been set up to accommodate linked Mailbox messages. The ability to attach messages or view attached messages depends on the user's Mailbox View permissions. Reply, reply all, and forward messages sent from a linked Mailbox will also be automatically linked to the BP.

To view the list of BP records to which a Mailbox message is linked:

1) Open the Mailbox message.

   If the message is linked to a BP record, the upper portion of the message will display the following:

   "This Mailbox and any future replies are linked to records. Show list" (where Show list is a hyperlink).
2) Click the **Show list** hyperlink to view the list of BP records to which the Mailbox is linked.

Additional Information about Using the Project Mailbox

External emails are important communications that need to be included in projects. Such emails can come from *project members* or from external users who do not use Unifier Essentials.

Note: To use any of the mailbox features, you must have permissions.

These email communications (and any attachments) are collected in a central repository for the *project*, called the **Inbox** (select **Mailbox**, select **Project Mailbox**, and then select **Inbox**) so that *project* members can use them in managing and documenting the *project*. After such emails reside in the **Inbox** , the *project* users can view them, forward them to appropriate members, flag them for review, and reply to them. In addition, the *project* users can link these emails to business process records.

Note: The external emails that have been blind carbon-copied (Bcc'd) are not collected by the **Inbox**.

To create additional folders:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Mailbox**, select **Project Mailbox**, and then select **Inbox** to open the Inbox log.

   If you have the **View** permission for **Inbox** sub-node, you can view all folders under the **Inbox** sub-node.
3) From the toolbar, click the folder icon to open the **Folders** window.

   You can see the folder icon only if you have the **Create/Manager Folders** permission.
4) Click the plus icon to open a new row.
5) Under the **Name** column, double-click the empty cell and enter a name for the new folder.
   - This field cannot be empty.
   - The maximum character length is 250.
   - You cannot use an existing name.
6) Under the **Email Address Code** column, double-click the empty cell and enter a code.
   - This field cannot be empty.
   - The maximum character length is 120.
   - You cannot use an existing code.
7) Click **OK**.

Your newly created folder appears in the existing list of folders below the **Inbox** node. The positioning of the folders below the **Inbox** node is according to the ordering of rows in **Folders** window. You can drag and drop rows in the **Folders** window to reorder the folder position in the left Navigator.

Note: You can reorder more than one folder at the same time.

In addition, you can double-click into any cell of the grid of an existing folder, in the **Folders** window, and edit the folder properties (**Name**, **Email Address Code**).

The email address is calculated by the system according to the **Project Email Pattern** that is defined in **Unifier Configurator**. As a result:

- When the **Project Email Pattern**, in the **Unifier Configurator**, is configured to be the *prefix*, the email address of the folder will be: <Email Address Code for the folder>-<project email id>. For example, if the **Email Address Code** of a folder is "construction," and the project email id is"bostonGenHospital-slc05kuz@internal-mail.oracle.com," then the folder email address will be "construction-bostonGenHospital-slc05kuz@internal-mail.oracle.com."
- When the **Project Email Pattern** is configured to be the *suffix*, the email address of the folder will be such that the **Email Address Code** gets appended to the very end of the project email id. For example, if the **Email Address Code** of a folder is "construction," and the project email id is "slc05kuz+bostonGenHospital@internal-mail.oracle.com," the folder email address will be "slc05kuz+bostonGenHospital+construction@internal-mail.oracle.com."

When a user sends an email to the email address of a folder, that email automatically lands inside the correct folder. Additionally, if the user specifies an incorrect value of the **Email Address Code**, and the rest of the project/shell email address is correct, that email automatically shows up in the **Inbox** sub-node under the **Project Mailbox** parent sub-node.

The toolbar options for the new folder (below the Email Address) are the same as the toolbar options for the **Inbox** sub-node. The actions **Move** and **Folder** are visible based on permissions.

The options **View**, **Edit View**, **Refresh**, **Search**, and **Find on Page** are the same as in **Inbox** sub-node.

The log layout listing the emails for a new folder is the same as for **Inbox** sub-node. Similar to **Inbox** sub-node, the user has the ability to move one or more emails from one folder to another using the right-click option and then selecting **Move** or using the **Move** option.

By default, **Inbox** is available under **Project Mailbox**. You have ability to select **Inbox**, move it to the "Available Modules and Business Processes" section and then move it back below any other parent node in the "Selected Modules and Business Processes" section.

When you move **Inbox** to the right section, the parent node **Project Mailbox** will disappear.

When you move **Inbox** from the right to the left section below a new parent node, the system inserts the **Project Mailbox** node as the direct parent node of **Inbox**. For example, if the original hierarchy was Folder A, Project Mailbox, Inbox, and the user moves the Inbox to the right section, and then moves it back to the left section below Folder B, the system displays the hierarchy as Folder B, Project Mailbox, Inbox. In other words, the Inbox always resides below the Project Mailbox.

You can send an email to Project/Shell users giving them information about the additional email address of a Project/Shell. The email is a system-generated message with the following elements:

Header: Email Address(es) for <project/shell number> - <project/shell name>

Subject: Email Address(es) for <project/shell number> - <project/shell name>

Body (text): This email is to inform you that a Unifier Essentials Mailbox has been setup for <project/shell number in bold chars> - <project/shell name in bold chars>

You must use the following general format for the email address: <project/shell email id>

If the Project/Shell contains additional folders, the following text between two forward slashes //:

```
//To send messages, including file attachments to specific folders, use
the following email address(es):
1. <Folder 1 name>: <Folder 1 email address>
2. <Folder 2 name>: <Folder 2 email address>
3. <Folder 3 name>: <Folder 3 email address>
... <and so on>
//
```

> **Note**: If there are no additional folders, this text must not be contained in the email body.

The email is a system-generated message.

All emails received, or existing emails in the **Project Mailbox**, are in the **Inbox** node below the **Project Mailbox** parent sub-node.

To open the *Project* Mailbox:

1) Open your *project*.
2) In the left Navigator, select **Mailbox**, select **Project Mailbox**, and then select **Inbox**. The right pane displays a log of the contents of the **Inbox**.

To open an email:

On the **Inbox** log, double-click the email. The system opens the email. If there are attachments, the email will display an **Attachments (n)** link. To open an attachment, click the link and double-click the attachment on the list that appears.

To flag an email for follow-up:

1) Open the email.
2) Click the **Flag for Follow-Up** button. The system opens the Flag for Follow-Up window.
3) In the **Flag to** field, choose the action you want for this email, such as "call," or "for your information."
4) Click the **Reply** button to reply to the email, or click the **Forward** button to forward the email on to someone.

   When the recipient opens the message, the specific flag remark is shown across the top of the message.

> **Note**: To remove the flag, click the **Flag for Follow-Up** button, and then click **Clear Flag**.

To move an email from one folder to another folder:

1) Go to **Inbox** and click the email that you want to move.
2) Click the **Actions** drop-down list and select **Move**. This opens the Move window.

   Alternatively, you can click the *gear menu* ( ) and select **Move**.
3) In the Move window, select the folder that you want to move the email into and click **OK**.

The **Move** option is available only if more than one folder (including the **Inbox**) exists below the **Project Mailbox** parent sub-node, and you have the permission to view the **Inbox**.

To create a folder:

1) Go to **Inbox** and click the folder icon.
2) In the Folders window click the plus option to open a row on the grid.
3) Double-click each cell of this new row, under **Name** and **Email Address Code** columns, and enter the values.
4) When finished, click **OK**.
5) Ensure that you see the new folder under the **Project Mailbox** parent sub-node, below the **Inbox** sub-node.

You can create folders only if you have the permission to "Create/Manage" folders for the **Project Mailbox**.

You can change the order of the folders by moving the rows in the Folders window.

The folders below the Inbox node in the left Navigator are arranged according to the order of rows in the Folders window. The Inbox sub-node is always the top folder and directly below the Project Mailbox parent sub-node.

To delete a folder:

1) Go to **Inbox** and click the folder icon.
2) In the Folders window, select the row of the folder that you want to delete.
3) Click the trash-can icon and click **OK**.

To reply to an email:

1) Open the email and click the **Reply** button.

   The system displays the addressee's email address in the **External To** field. You can add additional external addresses in this field, separated by semi-colons (;).
2) (Optional) To add email addresses to the Cc line, click the **Cc** button. The User/Group Picker opens.
   a. Select the user(s) you want to add to the message and click Add. The names appear in the Selected Users area at the bottom of the window.
   b. Click **OK**.
3) (Optional) To attach a file to the reply, click the **Attach** button and choose **My Computer** or **Primavera Unifier Folder**.
   a. In the window that opens, select the file you want to attack, or browse your computer directories to locate the files to attach.
   b. Click **OK**. The system attaches the file to your reply.
4) Enter your reply and click **Send**.

   The system sends the email to the persons you specified.

> **Note**: After you reply to an external email, the communication will become part of Unifier Essentials mailbox system. To see your reply, or any other communication regarding this email after this point, look for it in the **Inbox** sub-node of the left Navigator. Any reply you made to the email will appear in the **Sent Items** sub-node of the **Mailbox** node. Any email you forwarded will also appear in the **Sent Items** sub-node of the

Mailbox node.

To forward an email:

1) Open the email.
2) To forward the email, click the **Forward** button. A forward email window opens.
3) Click the **To** (and optionally, the **Cc**) button. The User/Group Picker opens.
4) Select the user(s) to whom you want to forward the message and click **Add**. The names appear in the Selected Users area at the bottom of the window.
5) (Optional) To forward the email to external users, enter their addresses in the **External Cc** field, separated by semi-colons (;).
6) Click **OK**. The system forwards the email to the persons you specified.

To delete an email:

On the Mailbox log, select the email and click the **Delete** button. To delete multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To print an email:

On the Mailbox log, select the email and click the **Print** button. To print multiple emails, hold down the **Ctrl** key on your keyboard and select the emails.

To find a specific email:

1) On the Mailbox log, click the **Find** button. The system opens a Find window at the top of the log.
2) Enter the search criteria.
   - To search for an email from a specific person, enter the person's email address in the **From** field.
   - To search for an email with a specific subject line, enter the subject line in the **Subjectcontaining** field.

   You can enter partial addresses or words in any of these fields. The system will display all the emails that match the partial information you entered.

   To search for an email with some specific content in the message, enter that content in the **Messagecontaining** field.
3) Click **Search** (or press **Enter**).

   The system will display the emails that match the criteria you entered. It will also identify the criteria by which you have searched the list in the "**Current View: filtered by**" line above the list.

Distributing the Project Mailbox Email Address to Users

Usually, your Administrator distributes the email address of the Project Mailbox to all project participants, both within and outside of Unifier Essentials. You can also distribute this email address to other users you consider appropriate for the project.

Ensure that you notify your Administrator of these new users. The Administrator must add the new email addresses to the approved email list for the project; otherwise, the Project Mailbox will not accept emails from these users.

The Administrator can define the project email address to create a more meaningful name that is related to the project.

To distribute the Project Mailbox email address:

Open the project home workspace and click the link shown for Email Address.

When an external user replies to a notification email:

- The address field of the form is automatically set to display the email address of the project.
- The reply email is captured in the project mailbox.

Working with Tasks, Notifications, and Drafts Nodes

When you are part of a business process workflow, you may be assigned a task.

- **Tasks** are steps for which you are currently the assignee.
- **Notifications** are records that you have been sent a copy but do not need to act.
- **Drafts** are items that you have worked on and saved but have not yet sent.

You can access your tasks, notifications, and drafts in the following locations:

- Home workspace, which shows your assigned tasks from all project/shell- and company-level BPs.

  Go to the Home workspace; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, open one of the items that required your attention or you want to work with.
- Company Workspace, which shows your assigned tasks for company-level BPs.

  Go to the **Company Workspace** tab and switch to **User** mode; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, open one of the items that required your attention or you want to work with.
- Project/Shell, which shows your tasks from the selected project/shell.

  Go to the shell tab and switch **User** mode; in the left Navigator, select **Tasks**, **Notifications**, or **Drafts**; from the applicable log, open one of the items that required your attention, or you want to work with.

Working with Your Project Information

You can access your project information from the **Information** node of that project. To do so:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Information**.

The **Information** node provides two sub-nodes — **Directory** and **General** — that provide more details about the project as explained below:

Directory

Contains a collection/log of the project-team members and their contact information. You may view the contact information of fellow team members and send email from within the system.

Note:

- Project members are listed if they are Active and the **Show user on the Projects Directory** option is selected for the user's account.
- A printed version of the Project Directory can be generated using user-defined reports.

The Directory toolbar includes the following options:

- **View**
  - Users/Groups: Name and Company columns are visible on the grid
  - Groups: Name column will be visible on the grid
  - Users: Name column will be visible on the grid per the design
- **Send Email:** To send an email, select a team member's name and click **Send Email**.

Note: This button will be visible when the **Hide User Profile** option is unchecked. It will be hidden when the option is checked.

- **Search:** To **Search** for users based on the selected **View** (Users/Groups, Groups, Users)
- **Find on Page:** To do a quick search for users based on the visible columns

To view a team member's user profile:

In the Project Directory, select the user from the log. The user details become visible in the right pane. The **General** tab will include the user's **Name** and **Company**. Additionally, a **Contact Information as in**, you can choose one of the following:

- **Company**: Displays the user's company contact information.
- **<Project Number: Project Name>**: Displays contact information specific to the current project, such as an on-site address or cell phone.

A **Basic Information** section will also be visible when the **Hide User Profile** option is unchecked.

To send an email:

In the Project Directory, select a user or group or both and click **Send email**. Or, from the user profile, click the user's email address. The **New Mail** page will open with the selected items from the log.

You can click the picker icon to select additional users or groups from the picker window. The ability to pick applies to the “To,” “CC,” and “Bcc” fields.

You may also contact a team member using Mailbox. Mail from all places in the product support Users and Groups as recipients.

Note: Email sent through your external email program will not be saved as part of the Unifier Essentials project record.

General

Contains a collection/log of the general information business process records that may have been added to the project.

The listed BP records originate as single-record business processes. In other words, only one BP record exists for each BP, per project. The **General** log is useful for project-specific information that only needs to be documented on a single form. It is a way to easily categorize, and find, big-picture project information, for example, the overall project data or descriptions.

To open a record, double-click it or click **Open** from the *gear menu* (⚙).

Working with Gates and Phases

Gates provide a structure to assess the quality and integrity of a project/shell throughout its life cycle.

Gates are, in essence, acceptance reviews following which a project/shell can advance to the next phase in the its life cycle. For each phase of the project/shell, a series of gate conditions are defined and tracked. Each gate condition is evaluated against actual project/shell data and is marked complete if conditions are met. After all conditions are complete, the project/shell moves to the next phase either automatically or manually, based on the configuration.

Phases and gate conditions are configured in Admin mode. For more information, see **How to Set Up Gates** in the *Unifier Essentials Modules Administration Guide*.

View the Gates Dashboard

When working with projects/shells, you can use the Gates dashboard to:

- Monitor the progress of phases.
- View phase conditions and their definitions.
- Run a gates process.
- Manually override gates conditions.
- Manually advance a project phase.

To access the Gates dashboard:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.

The Gates dashboard opens. The upper section indicates the status of the gate, such as Active or Inactive, and provides access to additional steps that you can take, such as viewing the Audit Log or manually moving the project/shell to the next phase. The Phases column on the left lists the phases assigned to the project/shell and indicates the current status. The Phase Information on the right provides more information and provides the option to search for specific conditions.

3) To view information about a specific phase, in the left column of the dashboard, select the phase.

View Gate Condition Details

To view gate condition details:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the left column of the **Gates** dashboard, select the applicable phase.
4) In the right column, click the linked **Condition Name**.

   The Phase Condition window displays the data type, data element, and trigger condition in a view-only format.

Validate Gate Conditions Manually (Refresh)

You can manually validate conditions, which is the same validation that is performed during scheduled runs. The dashboard is updated to show any changes to the gates conditions.

> **Note:** Your Administrator can configure the gates setup so that conditions are validated on each gates run.

To validate conditions manually:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Refresh**.

If a gates condition is met, the condition is marked as Complete. If all gates conditions are found to have been met for a project/shell phase (and if Automatic Advancement is **Yes**), the project/shell phase advances to the next phase.

Edit Phase Details

To edit phase details:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the left column of the **Gates** dashboard, select the applicable phase.
4) In the right column, do any of the following:
   - Mark a gate condition as complete by selecting the **Complete** checkbox next to it.

- Mark a completed gate condition as not complete by deselecting the **Complete** checkbox.
- Select and view gate condition details by clicking the linked **Condition Name**.
- Add or view comments by clicking **Comment** .

5) When you are done, click **Save**.

Advance to the Next Phase

After the gate conditions have been met for the current phase, you can manually advance a project/shell to the next phase.

To advance to the next phase:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the upper section of the **Gates** dashboard, click **Advance to Next Phase**.
4) In the **Confirmation** message, click **Yes** to confirm the advancement.

   The system validates whether all gates conditions have been met for that phase. If all gates conditions have been met for the current phase, the project/shell advances to the next phase. If any gate conditions have not been met, you can do the following:

   - Manually mark a gate condition as complete.
   - Select the **Ignore Condition** checkbox to override the gate condition requirements. For more information, see ***Edit Phase Details*** (on page 98).
   - Select the phase and click the linked **Condition Name** to view details about the phase and gate conditions to determine what needs to be done to meet the condition.

5) After changing the **Project Phase** in the **Shell Details** form, perform any of the following actions to prevent creating a workflow BP record in a different project phase:

   - Reload the page.
   - Close and reopen the **Shell** tab.

Return to a Previous Phase

To return to a previously completed phase and set it as the current phase:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the right column, do one of the following:

   - Select a gate condition and deselect the **Complete** checkbox so that it is no longer complete.
   - In **Admin** mode, add a new condition so that the completed phases are no longer complete. To do so, you must deactivate the gate, add the new condition, and then activate the gate. For more information, see **How to Set Up Gates** in the *Unifier Essentials Modules Administration Guide*.

4) When you are done, click **Save**.

Add or View Phase Comments

To view or add comments in a phase:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the left column of the **Gates** dashboard, select the applicable phase.
4) In the right column, add or view comments by clicking **Comment** .

   You can view comments posted by others and upload files from your local system. To view attached files, you must download them to your system first. The types of files that you can upload is based on the settings established by your administrator in the **Security** tab of the **Edit Company** window (for more information, see **Access Company Details** in the *Unifier Essentials General Administration Guide*).
5) If you added a comment or uploaded an attachment, click **Post** to save your changes.

   Note: After you have saved a comment, it cannot be edited or deleted.
6) When you are done, click the **X** to close the Comments box.

View, Print, or Delete Saved Gates Runs

You can view results from prior scheduled gates runs and search the list for specific results. You can also download a PDF version of a selected run or delete one or more selected runs.

To view saved gates runs:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Saved Gates Runs**.
4) On the **Saved Gates Runs** tab, do any of the following:
   - To search for a specific run, enter the search criteria in the **Search Log** field.
   - To view a specific run, select the checkbox for the run, and click **Download**. The system generates a PDF file, whose name includes the shell/project name and the date and time of the gates run.
   - To delete one or more runs, select the applicable checkboxes, and click **Delete**. When the **Confirmation** message appears, click **Yes** to continue.

View the Gates Audit Log

You can view the Audit Log and search the list for specific results. You can also download a PDF version of the log.

To view the Gates Audit Log:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Gates**.
3) In the upper section of the **Gates** dashboard, click **Actions**, and then select **Audit Log**.

   The Audit Log captures information such as the date and time at which a specific Event or Action occurred.
4) On the **Audit Log** tab, do either of the following:
   - To search for a specific entry, enter the search criteria in the **Search Log** field.
   - To download a PDF version of the log, click **Download**. The system generates a PDF file named Report.

Working with E-Signatures

You can use the system to send one file or a set of files for an electronic signature (e-signature), and you can send the package to other Unifier Essentials users and to external users. If you are using envelopes in DocuSign or Acrobat Sign, you can group documents into a single envelope. When the documents included in an envelope are returned to Unifier, they are consolidated into a single PDF instead of returning as individual attachments.

Internal user

When a **Send for E-Signature** action is taken, and one or more documents are sent to Unifier Essentials users (**Internal users**), an entry is made in the **E-Signatures** node to enable the user to act on the **E-Signatures** task.

The internal users can act on the E-Sign task from the:

- E-Signatures node.
- Email sent out to them from Unifier Essentials (if this is configured in the user's **Email Subscription** tab, which is located in **Preferences**).

When sending out an E-Signature request, for internal users, the **To** field in the **Send for E-Signature** dialog box lets you type-ahead to find a user or group. You can select one or more users or groups and send an E-signature request.

External user

When a **Send for E-Signature** action is taken, and one or more documents are sent to non-Unifier Essentials users (**External users**), the entity that provides electronic signature technology (DocuSign or Acrobat Sign) sends an email to each assignee (one email per document). The non-Unifier Essentials users can go to the Document Manager log, select a document, and click the **Sign** option from the *gear menu* ( ) to sign the document. This action launches the entity that provides electronic signature technology (DocuSign or Acrobat Sign) and enables you conduct a self-sign.

The external users are *unable* to act on the E-Sign task from the email sent out from Acrobat Sign or DocuSign.

When sending out an E-Signature request, for external users, the question-mark icon in the External field of the Send for E-Signature window informs the external user to enter multiple email addresses separated by commas or semi-colons and click Send for E-Signature.

If the external user enters an invalid email address, Unifier Essentials logs the signee's E-Signature status as Failed, in the E-Signature log. Unifier Essentials enables the user to hover over the status (Failed) and see the reason for failure, for example: Mailbox unavailable. Alternatively, the user can also click the *gear menu* ( ) Reason for Failure and see the reason, for example: Mailbox unavailable.

If there are only external signees in an E-Sign request, and all the email addresses of the external signees are invalid, the status of the E-Sign request will be set as Failed in:

- Document Manager log
- Attachments tab for BP Upper form, or detail form
- Attachments Review tab

If any of the recipients (external or internal) in the E-Sign request is a valid one, the status of the E-Sign request is based on the status of the valid signees. The system ignores the failed signee.

Proxy user

A proxy user can see all the E-Signature features (E-Signatures Node, E-Signature Status column in DM, Send for E-Signature/Self-sign actions, and so on) as they can be seen by the original user. If the proxy takes any of the E-Signature actions (Self-sign or Sign an E-Signature request from the E-Signatures node), then:

- The grid in the E-Sign Log displays one more column at the very end (Proxy User). The name of the proxy user is captured in this column (similar to the Proxy User column within the Audit log of a business process log). Note that this column shows up in the grid only if there has been a proxy action by at least one signee within an E-signature request.
- The Signee column shows the original signee's name; however, the exclamation-mark icon (at the end of this column) will indicate whether the signature action has been taken by a proxy. Hovering at this icon displays: Signed by Proxy User: <Proxy User Name>
- The Proxy User action options are available where the E-Sign Log can be seen (E-Signatures node, DM, BP attachments tab).

Note: The Proxy users can see the E-Signature count on the Company, Shell, and Project home landing pages.

Project landing page

Similar to the Company and Shell home landing pages, the project landing page shows the count of pending E-Signatures in the Items Requiring Your Attention section. The count can be seen below the Tasks count as: E-Signatures: <xx> Pending.

Note: The count is shown only if the E-Signatures are enabled for the project.

Internationalization

The user's language preferences is used when the E-Signature requests are sent out to external users by way of Acrobat Sign or DocuSign. For example, if a user's preferred language is Chinese, the E-Signature email request that is sent out to an external signee by way of Acrobat Sign or DocuSign will be in Chinese. The value of the "E-Signature Status" field is translated, and when you export the structure and properties of a DM file, the "E-Signature Status" column displays the translated values for the status.

DocuSign

When an internal or external user opens a document for signing, the document displays the option to reassign the document, for signing, to someone else (Assign to Someone Else) by using the "Other Actions" drop-down menu. Follow the prompts and note that:

- The document E-Signature Status in the DM log, BP attachments, or review attachments window (depending on whether the document was sent for E-signature from DM or BP) continue to reflect as "In-Progress."
- The E-Signature Log tab, in the right pane of the DM log, or in the right pane of the BP "Attachments" tab, is updated with:
  - The original signer's "E-Signature Status" as "Reassigned."
  - The "Completion Date" for the original signee with the date when the task was reassigned.

In addition, one more row will be inserted in the E-Signature Log with the:

- New signer's Name.
- E-Signature Status (as "Delivered").
- Initiated Date (as the date when the E-Signature task was reassigned to the new signer).
- Completion Date (as the Date when the new signer brings the E-Signature task to a terminal state: Completed, Declined, Reassigned, or Recalled.

When an E-Signature task is reassigned, DocuSign sends two emails to the new signer:

- The first email goes from the first assignee of the E-Signature task (who did the reassigning). After the new signer clicks "Review Document," DocuSign opens the document with features to electronically sign the document.

  After the document signing by new signer is complete, the DM log (or the BP attachments tab) from where the document was sent for signature will be updated with the existing row for the new signer in the E-Signature log with appropriate "E-Signature Status" and "Completion Date."
- The second email is sent to the new signer from the original sender of the E-Signature task.
  - After the new signer clicks "Review Document," DocuSign opens the document with features to allow for the document to be signed electronically.
  - After the document signing by new signer is complete, the DM log (or the BP attachments tab) will be updated with row for the new signer in the E-Signature log with appropriate "E-Signature Status" and "Completion Date."

Acrobat Sign

When an internal or external user opens a document for signing, Unifier Essentials displays the option to reassign the document (Delegate this document), for signing, to someone else by using the "Delegate" option. Follow the prompts and note that Acrobat Sign will send an email to the new signer.

When a signer delegates an E-Signature task to another assignee:

- The "E-Signature Status" in the right pane of the DM log, or in the right pane of the BP "Attachments" tab for the original signer will be updated as "Reassigned."
- The "Completion Date" will be updated as the date when the signer did the delegation or reassignment.
- A new row will be included in the "E-Signature Log" with the name of the new signer.

When a new signer responds to the E-Signature request email, the signer can select to review and sign, or to delegate.

Reports or Custom Prints

When you create a User-define Report (UDR), a Custom Print, or a Custom Report at any location in Unifier Essentials, You can add the E-Signature Status, or the fields, from the E-Signature Log in the report.

Completed Signature Requests

After all recipients have signed the request, they receive an e-mail notification. If they are using DocuSign, individual attachments are included in the email. If they are using Acrobat Sign, a single file that contains the combined documents is included with the email. For Unifier Essentials users, the signed file can also be viewed on the **E-Signatures** node. The signatures of the recipients appear on the actual page that they signed; they are not grouped on a specific page.

E-Signature Log

To access the **E-Signatures** log, go to your project and click **E-Signatures** node in the left Navigator.

The **E-Signatures** log has the following tools, options, and columns:

E-Signatures log toolbar

Field	Description
View	The function is similar to the View option available in several other logs. The options are: - **All** - **Group by Status** - **Group by Envelope Code** - **Create New View** - **Manage Views**
Edit View	The function is similar to the Edit View option available in several other logs.

Field	Description
	You can use this option to edit the current view (Active View).
Delete	Select one or more tasks and delete. You cannot delete incomplete tasks (tasks with **Status** set as **In-Progress**). If you delete a completed task, the E-signatures log (in Document Manager and within a BP record) displays the Status.
Print	The function is similar to the Print option available in several other logs. The options are: - **Print** - **Export to CSV** - **Export to Excel**
Search	Click to open the Search window at the bottom of the page. You can search inside all the columns available in the **E-Signatures** log.
Find on Page	The function is similar to the Find on Page option available in several other logs.

E-Signatures log columns

Column	Description
Name	The name of the document that has been sent for E-Signature. The column displays the file-type (extension) along with the name. **Note**: Because DocuSign converts all files to .pdf, the extension will always be .pdf in this column.
From	The name of the user who initiated the **Send for E-Signature** action (from the Document Manager or from within a BP record).
Status	The status of the E-Signature task: **In-Progress**: When assignee has not yet taken any action on the signature task. The default Status of any E-Signature task. **Completed**: When assignee opens the

Column	Description
	E-Signature task through DocuSign, and clicks **Continue** in the resulting window. The system populates the DocuSign fields, available on the left, (Signature, Initial, Date Signed, Name, First Name, Last Name, and so on). Assignee clicks **Finish** at the top to complete the signing. **Declined**: When assignee opens the E-Signature task and selects the option **Decline to Sign**. **Recalled**: The E-Signature task for all signers who have not yet completed the E-Signing process are recalled. If an E-Signature task has been created by way of **Send for E-Signature** action (from the Document Manager), sent to multiple signers, and at least one signer declined the task, or If an E-Signature task has been created by way of **Send for E-Signature** action (from within a BP record) and that BP record reaches a **Terminal** status. In such cases, when a user opens a task, the system displays an alert indicating that the Status is set to **Recalled**, and the **Completion Date** is set to the date when the task was recalled.
Envelope Code	If you are using envelopes in DocuSign or Acrobat Sign and a document or group of documents was submitted for an e-signature request, this column displays the code assigned to the envelope that contains the applicable documents. If an envelope is resubmitted for signatures, the code is overwritten with a new code.
Subject	The subject of the **Send for E-Signature** message.
Location	If the document was sent for signature from the Document Manager, this column displays the location in the Document Manager, for example: ... `/Field Reports/Action Items`. If the document was sent for signature from a BP record, this column displays the

Column	Description
	BP record number.
Received Date	The date when the **Send for E-Signature** task was received by the assignee. The default sort for this column is **Received Date** with latest received task at the top.
Completion Date	The date when the E-Signature task reaches a **Terminal** state (Status = Completed, Declined, Recalled).

E-Signatures log right pane

When you open the **E-Signatures** log, the top row item is selected by default, and the right pane of the **E-Signatures** log displays the following tabs:

Tab	Description
Preview	Displays a preview of the document that has been sent for signature. If the E-Signature task is in any of following statuses, this pane displays a preview of the original document that was sent for E-signature: • In-Progress • Declined • Recalled If the E-Signature task is in a **Completed** status, this pane displays a preview of the signed document.

Tab	Description
E-Sign Log	Displays a list of all internal and external users to whom a given document (from the Document Manager or from within a BP record) was sent for signature through the **Send for E-Signature**. The toolbar options let you: - **Print**: Print documents - **Download**: Download the latest signed copy of the document. The columns are: - **Signee**: The name of the user who must sign, or has signed, the document. If an internal user, the cell contains the user's first and last names. If an external user, the cell contains the user's email address. - **Status**: The e-signature status of the document for the signer. It can be: Delivered, Completed, Declined, or Recalled. - **Initiated Date**: The date when the document was sent for e-signature. This can be the date that an action was initiated by an internal user using the **Sign** option from the *gear menu* ( ). - **Completion Date**: The date when the e-signature task has reached a **Terminal** state (Status = Completed, Declined, Reassigned, Recalled). If a signer (internal or external) declines an e-signature task, you can see the reason by clicking the signer's entry and opening the Reason for Decline block at the bottom of the tab.
Message	Displays the message sent by the sender, when sending the document for signature through the **Send for E-Signature**.

E-Signature Log

If a signee declines an E-signature request, the E-Signature log captures the E-Signature status as Declined. When the status is Declined, the tooltip and the *gear menu* ( ) display the reason for decline.

When you select an E-Signature request from the **E-Signatures** node, you can see the **E-Signatures** log in the right pane (E-Sign Log). The log contains the:

- Message which was sent out at the time of sending the E-Signature request
- A log of all e-signature requests statuses.

When you hover over a row in the **E-Signatures** log, the *gear menu* (⚙) appears and enables you to perform the following on a task:

- **Sign**: Enables you to open the document and sign or do other reviews.
- **Delete**: Enables you to delete a task. You cannot delete an incomplete task (In-Progress, Deferred, or FaxPending).

When you double-click a row in the **E-Signatures** log, the sent document opens in the entity that provides electronic signature technology (DocuSign or Acrobat Sign). Follow the prompts and when done click **Finish** to close the external application.

After you finish signing a document, the **E-Signatures** log gets updated and the status changes to: **Completed**. At this stage, Unifier Essentials updates the **E-Signatures** log of the module (Document Manager or BP record) where the document was sent from and changes the status to: **Completed**. This update process also applies to the **Completion Date**.

After a document is signed (E-Signature status = Completed), the signed file gets added as a revision of the original file (as a pdf file and name appended by "_signed" and indicating the number of times the file was sent for e-signature).

Oracle Primavera Cloud Integration in Unifier Essentials Shell

The Company Administrator can use the **Primavera Cloud Integration** tab in the Unifier Essentials shell **Details** window to add or link a Unifier Essentials project to an Oracle Primavera Cloud project. When Unifier Essentials and Oracle Primavera Cloud are integrated, you can integrate cash flow data. When Unifier Essentials, Oracle Primavera Cloud, and Oracle Integration are integrated, you can use Oracle Integration recipes to update the System Activity Sheet or the Master Rate Sheet (or both) in Unifier Essentials with information from Oracle Primavera Cloud.

Note: You can use a Gateway Integration or a Primavera Cloud Integration with Unifier Essentials; you cannot use both. While one integration remains active, the other is unavailable.

To add or link a project to an Oracle Primavera Cloud project in the shell **Details** window:

1) Go to the shell (**Admin** mode or **User** mode, if you have the required permissions) that contains the project that must be linked.
2) In the left Navigator, select the shell name node to open the shell landing page.
3) Click the more menu option (the three horizontal dots icon next to **My Dashboard**) to open the drop-down list and click **Details** to open the **Details** window.
4) Click the **Primavera Cloud Integration** tab.
5) Click **Add**, and select **Primavera Cloud Cash Flow** or **Primavera Cloud Schedule** to select the Oracle Primavera Cloud project from the linked projects in Lobby.
   - If more than one Oracle Primavera Cloud project is available, the system will open a window (**Select Project** window) and display the list of all Oracle Primavera Cloud projects that are linked to the project.
   - If there is only one Oracle Primavera Cloud project is available, the system will automatically add the project to the **Primavera Cloud Integration** tab.
   - If you must change the Oracle Primavera Cloud project, or for any reason remove an existing Oracle Primavera Cloud project ID (coming from the linked projects from Lobby) and there is already data exchanged between the projects, you can delete the project from the list and proceed with adding a new Oracle Primavera Cloud project as a link.
6) When finished, click **Save**. To discard your changes, or to close the tab, click **Cancel**.

The **Primavera Cloud Integration** tab is only available in the shell Details window. The tab is not available in the Shell template or Shell creation window.

Notes:

- The Lobby lets you access your projects that are managed in both Unifier Essentials and Oracle Primavera Cloud. For details about the Lobby, refer to the ***Construction and Engineering Lobby Help*** (see Construction and Engineering Lobby Help - ***https://docs.oracle.com/cd/F23711_01/help/en/202246.htm***) (https://docs.oracle.com/cd/F23711_01/help/en/202246.htm).

- After you sign into the Lobby, you can view all the projects/shells that you are a member of.

After the system authenticates and connects Unifier Essentials with Oracle Primavera Cloud, and the project service contains the project links defined between the Unifier Essentials project and the Unifier Essentials with Oracle Primavera Cloud project within the Lobby, the Company Administrator can add the Oracle Primavera Cloud project ID to the **Primavera Cloud Integration** tab with the integration type selected as the Oracle Primavera Cloud cash flow or schedule.

The following columns are shown in the **Primavera Cloud Integration** tab:

Note: The contents of the columns are read-only.

Column Name	Contents
Project ID	Displays the source project ID (the Oracle Primavera Cloud Project Number).
Project Name	Displays the source project name (the Oracle Primavera Cloud Project Name).
Primavera Cloud Workspace	Displays the Oracle Primavera Cloud workspace name.
Integration Type	Displays the applicable integration, cash flow or integration.

Based on the **Integration Type** selected, the **Project ID** entered will initiate the project synchronization with the source application (Oracle Primavera Cloud) when the cash flow data is sent (pushed) or when the **Get Data** option is initiated for the System Activity Sheet or Master Rate Sheet.

If a selected Oracle Primavera Cloud project becomes inactive in the source application (Oracle Primavera Cloud), the row information will remain the same in the **Primavera Cloud Integration** tab, but when a data push or pull is initiated from anywhere, the system will display an error in the **Integration History Details** window.

In This Section

Oracle Primavera Cloud Integration and Unifier Essentials Cash Flow (User Mode)

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Financial Analysis**, and then select **Cash Flow**.

3) In the **Cash Flow** log, to send (push) or receive (pull) the data, click the **Actions** drop-down menu and select one of the following options:

Note: These options are available only if the projects are linked.

- **Send Data to Primavera Cloud**
- **Get Data from Primavera Cloud**

  You can use the **Get Data from Primavera Cloud** option after the Oracle Primavera Cloud Portfolio Manager has made updates to the planned budget that you have submitted.

The **Integration History Details** option (in the **Actions** drop-down menu) lets you open the **History Details** window and see the action name (**Get Data** or **Send Data**), requestor information, date and time of the job initiation, start date and end date of the action, and the status of each action (**Completed**, **Failed**, or **Completed with errors**). The status **Completed with errors** is shown when the data push of at least one project of the selected projects has failed.

The **History Details** window shows whether the push or pull of the cash flow data to the linked projects is successful. If a push is not successful, the system will display a message specifying the reason for failure.

You can select a history record and click **Open** to open the **Job Details** window and see more details, such as the shell name (the Unifier Essentials shell that contains the project), dates, status, and a message that indicates whether getting data from, or sending data to, the Oracle Primavera Cloud project <PROJECTNAME> is successful. Use the toolbar options on the **History Details** window to open items, refresh the items displayed, print (including exporting to CSV or Excel) items, or find an item.

When the source project is not active, the system displays a message indicating that the source project ID is not active.

Note: When you incorporate changes or modify the cash flow data and save your changes, it will take the system at least five seconds to refresh the data. User can select Send Data options after five seconds to push the latest cash flow data to Oracle Primavera Cloud.

Send Data to Primavera Cloud

The Unifier Essentials Project Manager (user) can select one or more **By CBS** and **By Summary CBS** cash flow curves and click the **Send Data to Primavera Cloud** option to send (push) the **By CBS** and **By Summary CBS** cash flow curves data to Oracle Primavera Cloud.

The following data is also sent to Oracle Primavera Cloud, for each curve type that is selected in the cash flow configuration:

- From Date: The earliest From Date for each curve (**Baseline**, **Forecast**, and **Actuals**) from all defined cash flow curves (except the by commitment curves), in the log.
- To Date: The latest To Date for each curve (**Baseline**, **Forecast**, and **Actuals**) from all defined cash flow curves (except the by commitment curves), in the log.
- Distributed cost data by period.
- Total

Only the data from the **By Project/Shell**, **By CBS**, and **By Summary CBS** cash flow curves will be sent (pushed) to the Oracle Primavera Cloud project cash flows.

Get Data from Primavera Cloud

The Unifier Essentials Project Manager (user) can select this option so the **By Project/Shell**, **By CBS**, and **By Summary CBS** cash flow curves data will receive the Portfolio Budget data from Oracle Primavera Cloud.

The following data is also sent to Oracle Primavera Cloud, for each curve type that is selected in the cash flow configuration:

- From Date: The earliest From Date for each portfolio budget curve defined in the cash flow configuration.
- To Date: The latest To Date for each portfolio budget curve defined in the cash flow configuration.
- Distributed cost data by period.
- Total

At this point:

The Project Manager will email the Oracle Primavera Cloud Portfolio Manager informing the Portfolio Manager that a new budget planning information or data has been sent. This communication also signals the request for a response from the Portfolio Manager.

The Oracle Primavera Cloud Portfolio Manager goes to the corresponding project cash flow in Oracle Primavera Cloud and refreshes the log to receive the data.

Oracle Primavera Cloud, Oracle Integration, and Unifier Essentials

If the Company Administrator integrates Unifier Essentials, Oracle Primavera Cloud, and Oracle Integration and assigns you the applicable permissions, you can use Oracle Integration recipes to view and update the System Activity Sheet or the Master Rate Sheet (or both) in Unifier Essentials with information from Oracle Primavera Cloud by using Oracle Integration Recipes.

When the Master Rate Sheet is integrated, it lets you use **Get Data** to bring in information from Oracle Primavera Cloud through the Rate Sheet Recipe. You can then view the Roles and Resources information, as well as Rates. When the System Activity Sheet is integrated, it lets you use the Activity sheet Recipe to add connections on the **Details** page for a project/shell. For more information, see the *Unifier Essentials General Administration Guide*.

To view the Master Rate Sheet:

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Master Rate Sheet**.
3) Double-click the sheet to open it.

You can filter the sheet based on different fields by clicking **Find on Page** and entering the applicable information from Oracle Primavera Cloud.

To view a System Activity Sheet:

1) Go to the shell tab and switch to **User** mode.
2) In the left Navigator, select **Schedule Management**, and then select **Activity Sheet**.

3) In the **Activity Sheets** log, select the **System Activity Sheet**.
4) In the right pane, use the **History** tab to view a list of **Actions** taken.

Starting a Project by Using Business Processes

A user, such as a Project Manager or Project Coordinator, can create a project using primarily business processes (BPs) without relying on integration tools, such as P6 or Microsoft Project, to create the project and maintain schedules and budgets. The following outlines the main steps that you can use to start a project.

To create and launch a new project:

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) Complete a ***Project Request BP*** record.

   After the Project Request BP is approved, the system automatically creates a project, which includes an Activity Sheet and a Work Breakdown Structure (WBS) Sheet.

   The remaining steps are completed from the new Project.
3) To confirm the Schedule Start Date, save the Activity Sheet properties.
4) Add and remove activities and, if applicable, adjust the duration of each activity, and save your changes.
5) (Optional) Update the activities to assign WBS codes.
6) (Optional) Assign resources or roles to the activities.
7) In the Activity Sheet, from the toolbar, click **Actions**, and select **Create Baseline** to create a baseline schedule, and then click **Schedule** from the toolbar to update the schedule.
8) Use the ***Estimate BP*** to create one project estimate or multiple estimates for comparison.

   An Estimate BP record with an Approved status will update the Estimate column on the Project Cost Sheet. It is also used for the Estimate Cash Flow in the project.
9) In the left Navigator, select **Financial Analysis**, and then select **Cash Flow** to refresh the cash flow curve for the Estimate BP.

   You can also use the Estimate BP record to create an Initial Budget BP automatically.

   > **Note:** There must be a user in the Project Manager or Project Coordinator group in the project to receive the Initial Budget record sent for Prepare.

10) If you chose not to create an Initial Budget BP automatically, create one manually; otherwise, update and approve the existing Initial Budget BP record.
11) Refresh the cash flow curve for the project.

    Refreshing the Cash Flow adds curve start and end dates from the Activity Sheet for Forecast and Baseline curves with amounts from the Approved Initial Budget and Forecast Cost Sheet columns. By default, Cash Flow distribution uses an S-Curve, but you can select a different distribution for each curve in the Cash Flow curve properties in your Project Template or directly in a single-project shell. Do *not* change this in the ORACLE PROJECT TEMPLATE.
12) Select the updated milestones, such as Project Start Date and Project Finish Date, on the Project Details form.

13) Add the relevant activities and milestones to additional BPs, such as Change Order, Request for Information (RFI), and so on.

Project-Level Business Processes

This section outlines the Business Processes available at the project level.

In This Section

Budget Management

Estimate Business Process

Use the Estimate business process to create multiple project estimates, which can then be consolidated into the project's Initial Budget. Multiple scenarios can be built and compared.

The ORACLE PROJECT TEMPLATE includes an Estimate cash flow curve. Project Managers, Project Administrators, and Project Coordinators who have the necessary permissions can use the Master Schedule activity sheet to populate cash flow dates. The summarized Estimate amount will come from the Approved Estimates column on the Project Cost Sheet. Predefined distribution curves are available, or costs can be spread manually. Using the Estimate cash flow curve facilitates capital planning before an Initial Budget is created, which subsequently creates a Forecast cash flow curve.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Active	non-terminal status
Discarded	non-terminal status
Informal	non-terminal status
Proposed	non-terminal status
Scenario_1	non-terminal status

Scenario_2	non-terminal status
Scenario_3	non-terminal status
Scenario_4	non-terminal status
Scenario_5	non-terminal status

Related Processes

The Estimate business process might create the following business processes: Initial Budget

The Estimate business process might be created by the following business processes: Project Request (Note that this is created through use of BP Data Transfer.)

Creating an Estimate record

Create an Estimate record by navigating to Budget Management / Estimate on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Estimate form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Budget Management**, and then select **Estimate**.
3) On the Estimate page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Estimate Form

Key Information

Key information about this Estimate record

Field Name	Access	Description
Title	Editable	Enter a title.
Amount	Read-Only	Amount of this record or line item
Estimate Type	Editable	The type of the estimated budget
Estimate Category	Editable	The category for the estimated budget

Field Name	Access	Description
Create an Initial Budget on Approval?	Editable	If selected, the system automatically creates an initial budget record after the estimated budget is approved. **Note:** Excluded line items are not included in the initial budget record.
Estimate Version	Editable	This field is optional. If a previous budget estimate has been rejected or canceled, increment the version in this field.
Status	Required	Estimates typically begin as Informal and move to Active after they are prepared for review. They then move to Proposed before either being set to Approved or Discarded. After the Estimate is set to Approved, it can no longer be changed. You can also use the various Scenarios to compare different options.

Description

Enter a scope description, assumptions, justification, and anything else needed for this Estimate.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Estimate Units

Use the fields below to specify how this Estimate will be built. The selections here will be used for new line items that are added but can be changed per line item. The Project Total GSF and NASF are included for information purposes.

Field Name	Access	Description
Project Total GSF	Read-Only	The total Gross Square Footage (GSF) of the areas involved in the project scope
Project Total NASF	Read-Only	The total Net Assignable Square Footage (NASF) of the areas involved in the project scope
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	The total cost divided by the unit quantity for this record

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Budget Date Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Decimal UDF 1	Disabled	Reserved for future use by your organization
Budget Decimal UDF 2	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Budget Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Budget Text 255 UDF 1	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 2	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 3	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 4	Disabled	Reserved for future use by your organization
Budget Long Text UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Budget Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Estimate is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that should be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Estimate line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment

- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Specify a cost code for this Estimate line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Budget Details

Enter the cost for this line item as a lump sum or a unit rate. Note that **excluded** lines will have their amounts zeroed out.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter additional information specific to this Estimate line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this Estimate line item.

Field Name	Access	Description
Exclude?	Editable	Exclude the line item

Field Name	Access	Description
		amount but keep the line item in the record for informational purposes.
Spend Category	Editable	The spending category
Work Package	Editable	Select the Work Package that this item will roll up to.
Budget Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Fund Appropriation Business Process

Use the Fund Appropriation business process to capture the allocation of funds to the project. These funds are defined and made available through the Company Funding Sheet.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Fund Appropriation business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Creating a Fund Appropriation Record

Create a Fund Appropriation record by navigating to Budget Management / Fund Appropriation on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Fund Appropriation task that has been assigned to you from the Tasks log.

Complete the Fund Appropriation form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Budget Management**, and then select **Fund Appropriation**.
3) On the Fund Appropriation 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **Fund Appropriation**.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Fund Appropriation but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Fund Appropriation Form

Key Information

Key information about this Fund Appropriation is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Fund Appropriations Version	Editable	This field is optional. In case a previous fund appropriation has been rejected or canceled, you can increment the version in this field.
Due Date	Editable	Target completion date for

Field Name	Access	Description
		this record. A default duration has been set by your administrator but can be overridden here for this record.

Financial Summary

The information below gives a snapshot of the current budget and impact of this and other Fund Appropriations.

Field Name	Access	Description
A. Initial Budget	Read-Only	The total amount of all approved initial budget records
B. Previously Approved Budget Changes	Read-Only	The total amount of all previously approved budget changes
C. Current Revised Budget (A+B)	Read-Only	The amount of the revised budget prior to the budget change
D. Funds Previously Appropriated	Read-Only	The total amount of all previously approved fund appropriations in this project
Difference (D - C)	Read-Only	This field shows the difference between the revised project budget amount and the approved funding, to date.
E. Current Request	Read-Only	The funding amount being requested
F. Total Funding upon Approval (D + E)	Read-Only	The total funds appropriated after the approval of this fund appropriation
Difference upon Approval (F - C)	Read-Only	This field shows the difference between the revised project budget amount and the total approved funding of the record.

Funding Period

Specify the dates for this funding allocation. The information here may be used for reporting purposes. Note that any line items added will inherit these dates, but you can override them at the line item level.

Field Name	Access	Description
Funding Use Start Date	Editable	The date when the funding becomes available for this project
Funding Use End Date	Editable	The date when the funding is no longer available for the project

Description

Enter a scope description, assumptions, justification, and anything else needed for this Fund Appropriation.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the

Field Name	Access	Description
		necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Fund Appropriation Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Fund Appropriation Date Picker UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Date Picker UDF 2	Disabled	Reserved for future use by your organization
Fund Appropriation Decimal UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Decimal UDF 2	Disabled	Reserved for future use by your organization
Fund Appropriation Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Fund Appropriation Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Fund Appropriation Picker UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Fund Appropriation Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Fund Appropriation Text 255 UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Text 255 UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Fund Appropriation Text 255 UDF 3	Disabled	Reserved for future use by your organization
Fund Appropriation Text 255 UDF 4	Disabled	Reserved for future use by your organization
Fund Appropriation Long Text UDF 1	Disabled	Reserved for future use by your organization
Fund Appropriation Long Text UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Fund Appropriation line items can be consolidated from the following business process: Fund Appropriation

Completing the Fund List tab

General

Specify a funding code for this Fund Appropriation line item.

Field Name	Access	Description
Funding Source	Required	Enter a funding source.
Fund Name	Read-Only	The name of the fund appropriations
Fund Description	Read-Only	The description of the fund appropriation
Fund Year	Read-Only	The year of the fund

Funding Amount

Enter the amount to appropriate for this line item.

Field Name	Access	Description
Amount	Editable	Amount of this line item

Description

Enter additional information specific to this Fund Appropriation line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.

Field Name	Access	Description
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Funding Period

Information about the availability of funds being allocated in this line item. The Funding dates are automatically filled with dates from the selected fund. The Funding Use dates specify when those funds are expected to be used within this project. This information might be used for reporting purposes.

Field Name	Access	Description
Funding Start Date	Read-Only	The date when the funding becomes available
Funding End Date	Read-Only	The date when the funding is no longer available
Funding Use Start Date	Editable	The date when the funding becomes available for this project
Funding Use End Date	Editable	The date when the funding is no longer available for the project

Funding Restrictions

Information regarding any restrictions on how these funds can be spent.

Field Name	Access	Description
Fund Restrictions - Description	Read-Only	Additional restrictions on how this fund can be used
Justification	Editable	The justification concerning why this fund can be used on this project, based on the restrictions

Additional Information

The Fund Appropriations Line Item Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Fund Appropriation Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Fund Appropriation Item	Disabled	Reserved for future use by

Field Name	Access	Description
UDF Text 255 1		your organization
Fund Appropriation Item UDF CA 1	Disabled	Reserved for future use by your organization
Fund Appropriation Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Initial Budget Business Process

Use the Initial Budget business process to define and approve the initial budget on the project. After it is approved, changes can be made via the Budget Change and Budget Transfer business processes.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Initial Budget business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Initial Budget business process might create the following business processes: Not applicable

The Initial Budget business process might be created by the following business processes: Estimate

Creating an Initial Budget Record

Create an Initial Budget record by navigating to Budget Management / Initial Budget on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Initial Budget task that has been assigned to you from the Tasks log.

Complete the Initial Budget form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Budget Management**, and then select **Initial Budget**.
3) On the Initial Budget 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Initial Budget.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Initial Budget but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Initial Budget Form

Key Information

Key information about this Initial Budget is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Initial Budget Version	Editable	This field is optional. If a previous initial budget has been rejected or canceled, you can increment the version in this field.
Due Date	Editable	Target completion date for this record. A default

Field Name	Access	Description
		duration has been set by your administrator but can be overridden here for this record.

Description

Enter a scope description, assumptions, justification, and anything else needed for this Initial Budget.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	The total cost divided by the unit quantity for this record

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.

Field Name	Access	Description
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Initial Budget Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Budget Date Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Decimal UDF 1	Disabled	Reserved for future use by your organization
Budget Decimal UDF 2	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Budget Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Initial Budget Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Budget Text 255 UDF 1	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 2	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 3	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 4	Disabled	Reserved for future use by your organization
Budget Long Text UDF 1	Disabled	Reserved for future use by your organization
Budget Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Initial Budget is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Initial Budget line items can be consolidated from the following business processes:

- Budget Change

- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Specify a cost code for this Initial Budget line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Budget Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item. Amount = Quantity x Item Unit Cost.

Description

Enter a description for this Initial Budget line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field. This field can be expanded, if needed.

Additional Information

Enter additional information specific to this Initial Budget line item.

Field Name	Access	Description
Spend Category	Editable	The spending category
Work Package	Editable	Select the Work Package that this item will roll up to.
Budget Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Budget Change Business Process

Use the Budget Change business process to make (non-zero amount) changes to the project's budget. This modifies the Initial Budget in the cost sheet, creating a Revised Budget. For zero-sum changes to the project budget, use the Budget Transfer business process.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Rejected	terminal status
Canceled	terminal status
Awaiting_Review	non-terminal status

Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Budget Change business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Budget Change business process might create the following business processes: Not applicable

The Budget Change business process might be created by the following business processes: Forecast

Creating a Budget Change Record

Create a Budget Change record by navigating to Budget Management / Budget Change on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Budget Change task that has been assigned to you from the Tasks log.

Complete the Budget Change form and attach related documents, if needed. After completing the Budget Change form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Budget Management**, and then select **Budget Change**.
3) On the Budget Change 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Budget Change.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Budget Change but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Budget Change Form

Key Information

Key information about this Budget Change

Field Name	Access	Description
Title	Required	Title of the record
Amount	Read-Only	Amount of this record or line item
Reason	Editable	Budget change reason
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Budget Change Version	Editable	This field is optional. If a previous budget change has been rejected or canceled, you can increment the version in this field.

Description

Enter a scope description, assumptions, justification, and anything else needed for this Budget Change.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Financial Summary

The information below gives you a full snapshot of the current budget and impact of this and other Budget Changes. For more information, consult the cost sheet.

Field Name	Access	Description
A. Initial Budget	Read-Only	The total amount of all approved initial budget records

Field Name	Access	Description
B. Previously Approved Budget Changes	Read-Only	The total amount of all previously approved budget changes
C. Current Revised Budget (A+B)	Read-Only	The amount of the revised budget prior to the budget change
D. Other Pending Budget Changes	Read-Only	The total amount of all other budget changes currently pending approval
E. Current Request	Read-Only	The total amount of all the line items in this budget change
Current Change % Increase (E / C)	Read-Only	The percent increase of the budget change, against the revised budget
F. Potential Budget (C+D+E)	Read-Only	The revised budget after the budget change approval

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record
Unit Quantity	Editable	The default unit quantity used for any line items that are added to this record
Cost per Unit	Read-Only	The cost per unit amount divided by the unit quantity, for the initial budget

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is

Field Name	Access	Description
		based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Budget Change Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Budget Date Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Decimal UDF 1	Disabled	Reserved for future use by your organization
Budget Decimal UDF 2	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Budget Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Budget Change Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Budget Text 255 UDF 1	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 2	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 3	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 4	Disabled	Reserved for future use by your organization
Budget Long Text UDF 1	Disabled	Reserved for future use by your organization
Budget Long Text UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Budget Change line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Specify a cost code for this Budget Change line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Budget Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Required	Enter the Item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter a description for this Budget Change line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this Budget Change line item.

Field Name	Access	Description
Spend Category	Editable	The spending category
Work Package	Editable	Select the Work Package that this item will roll up to.
Budget Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF CA 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Budget Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Budget Transfer Business Process

Use the Budget Transfer business process to define, review, and approve transfers between cost codes within the project budget. The amount of this record must be zero to submit it. If you must add or remove budget from the project, use the Budget Change business process.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Rejected	terminal status
Canceled	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Budget Transfer business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Creating a Budget Transfer Record

Create a Budget Transfer record by navigating to Budget Management / Budget Transfer on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Budget Transfer task that has been assigned to you from the Tasks log.

Complete the Budget Transfer form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.

2) In the left Navigator, select **Budget Management**, and then select **Budget Transfer**.
3) On the Budget Transfer 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Budget Transfer.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Budget Transfer but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Budget Transfer Form

Key Information

Field Name	Access	Description
Title	Required	Enter a title.
Amount	Read-Only	Amount of this record (the sum of the line-item amounts)
Reason	Editable	Budget change reason
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Budget Transfer Version	Editable	This field is optional. If a previous budget transfer has been rejected or canceled, you can increment the version in this field.

Field Name	Access	Description
Transferred Amount	Editable	A Budget Transfer BP record is always a net-zero transaction with a total amount of zero. The Transferred Amount is one side of the total transaction to show the significance of the transfer.

Description

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Record Information

The Budget Transfer Record Information block displays details about the record.

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the

Field Name	Access	Description
		necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Budget Transfer Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Budget Date Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Decimal UDF 1	Disabled	Reserved for future use by your organization
Budget Decimal UDF 2	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Budget Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Budget Picker UDF 1	Disabled	Reserved for future use by your organization
Budget Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Budget Transfer Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Budget Text 255 UDF 1	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 2	Disabled	Reserved for future use by your organization
Budget Text 255 UDF 3	Disabled	Reserved for future use by

Field Name	Access	Description
		your organization
Budget Text 255 UDF 4	Disabled	Reserved for future use by your organization
Budget Long Text UDF 1	Disabled	Reserved for future use by your organization
Budget Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Budget Change line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget

- Invoice
- Issue
- Journal Entry
- PO Amendment
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Specify a cost code for this Budget Transfer line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Budget Details

Enter the cost for this line item as a credit (positive) or a debit (negative) amount.

Field Name	Access	Description
Amount	Required	Amount of this line item

Description

Enter a description for this Budget Transfer line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this Budget Transfer line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.

Field Name	Access	Description
Budget Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Budget Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Forecast Business Process

Use the Forecast business process to create and update a master project forecast, or to add one or more forecast adjustments. These forecasts become part of the overall project profile in the Cost Sheet.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Approved	non-terminal status
Discarded	non-terminal status
Informal	non-terminal status
Proposed	non-terminal status
Scenario_1	non-terminal status
Scenario_2	non-terminal status
Scenario_3	non-terminal status
Scenario_4	non-terminal status
Scenario_5	non-terminal status

Related Processes

The Forecast business process might create the following business processes: Budget Change

The Forecast business process might be created by the following business processes: Not applicable

Creating a Forecast Record

Create a Forecast record by navigating to Budget Management / Forecast on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Forecast form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Budget Management**, and then select **Forecast**.
3) On the Forecast page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Forecast Form

Key Information

Key information about this Forecast

Field Name	Access	Description
Title	Editable	Enter a title.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Forecast Type	Editable	This field lets you build, modify, and adjust the forecast record to track the changes over time.
Forecast Category	Editable	Indicate a category of the forecast.
Create a Budget Change on Approval?	Editable	If selected, the system automatically creates a budget change record after the forecast is approved. **Note**: The excluded line items are not included in the created budget.
Forecast Version	Editable	This field is optional. In case a previous forecast has been rejected or canceled, increment the

Field Name	Access	Description
		version in this field.
Status	Required	Forecasts typically begin as Informal and move to Active after they are prepared for review. They will then move to Proposed before either being set to Approved or Discarded. You can also use the various Scenarios to compare different options.

Description

Enter a scope description, assumptions, justification, and anything else needed for this Forecast.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Financial Information

Financial impact of this Forecast record

Field Name	Access	Description
A. Approved Forecasts	Read-Only	The total of all other forecast records to date
B. Current Forecast / Adjustment	Read-Only	The current amount for the forecast, or after forecast, adjustment
C. Revised Forecast (A + B)	Read-Only	Use this field to revise the forecast after approval.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number

Field Name	Access	Description
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Forecast Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Forecast Date Picker UDF 1	Disabled	Reserved for future use by your organization
Forecast Date Picker UDF 2	Disabled	Reserved for future use by your organization
Forecast Decimal UDF 1	Disabled	Reserved for future use by your organization
Forecast Decimal UDF 2	Disabled	Reserved for future use by your organization
Forecast Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Forecast Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Forecast Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Forecast Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Forecast Picker UDF 1	Disabled	Reserved for future use by

Field Name	Access	Description
		your organization
Forecast Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Forecast Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Forecast Text 255 UDF 1	Disabled	Reserved for future use by your organization
Forecast Text 255 UDF 2	Disabled	Reserved for future use by your organization
Forecast Text 255 UDF 3	Disabled	Reserved for future use by your organization
Forecast Text 255 UDF 4	Disabled	Reserved for future use by your organization
Forecast Long Text UDF 1	Disabled	Reserved for future use by your organization
Forecast Long Text UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Forecast line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk

- Work Release

Completing the Line Items tab

General

Specify a cost code for this Forecast line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Budget Details

Enter the cost for this line item as a lump sum or a unit rate. Note that **excluded** lines will have their amounts zeroed out.

Field Name	Access	Description
Line Item Cost	Editable	Cost for this line item. Note that excluded lines will have their amounts zeroed out.
Amount	Read-Only	Amount of this record or line item. Equal to the Line Item Cost field unless the Exclude field is set to yes.

Description

Enter additional information specific to this Forecast line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter any additional information to the short description. This field can be expanded, if needed.

Additional Information

Enter additional information specific to this Forecast.

Field Name	Access	Description
Exclude?	Editable	Select Yes if you want to keep this line item in the record for informational purposes but exclude the

Field Name	Access	Description
		amount.
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.

Commitments

Request for Bid Business Process

Use the Request for Bid business process to prepare, invite, and award a bid for a Contract. It differs from most other business processes as it allows vendors who are not licensed users in the system to participate in the process. (The vendors participate in the bidding process through a bidder portal to which they receive invitations that include access information.) After bidding has closed, a winning bid is selected, and a Contract is created with that Vendor.

This version differs from the Request for Bid Unsealed business process because bids cannot be viewed until the bidding has closed.

Special Behaviors

For more information about using this business process (BP), such as using private bidding or comparing bids, see **Request for Bid (RFB) Business Processes** in the *Unifier Essentials Business Processes Reference Guide*.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Bid_Awarded	terminal status
Bid_Canceled	terminal status
Bid_Rejected	terminal status
Bid_In_Progress	non-terminal status
Bid_Preparation	non-terminal status
Bid_Review	non-terminal status

Workflow

The default workflow for the Request for Bid business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Request for Bid business process might create the following business processes: Contract

The Request for Bid business process might be created by the following business processes: Not applicable

Creating a Request for Bid Record

Create a Request for Bid record by navigating to Commitments / Request for Bid on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Request for Bid task that has been assigned to you from the Tasks log.

Complete the Request for Bid form and attach related documents. After completing the Request for Bid 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 tab and switch to **User** mode.
2) In the left Navigator, select **Commitments**, and then select **Request for Bid**.
3) On the Request for Bid 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Request for Bid.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Request for Bid but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Request for Bid Information Form

Key Information

Key information specific to the bid

Field Name	Access	Description
Title	Required	Enter a title.
Override Options Permitted	Editable	Indicates whether the bidder can change the Quantity or Unit of Measure, or both.
Bid Number	Editable	Bid Number
Require Bid Attachments	Editable	To require bidders to add attachments, select this option.
Bid Package Revision Number	Editable	Revision number of the bid package
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Request for Bid Dates

Key dates on the bid process

Field Name	Access	Description
RFB Due Date	Editable	Date until which the bidder can submit its proposal
Order Delivery Date	Editable	Date for the vendor to deliver the required materials or services
Question Cut Off Date	Editable	Date limit for the bidders to submit questions
Bid Priority	Editable	Priority of the bid

Estimate Cost Summary

Field Name	Access	Description
Total Estimated Cost	Read-only	Displays the current estimated cost of the bid.

Bid Sponsor

Information related to the bid sponsor

Field Name	Access	Description
Bid Sponsor	Editable	Bid sponsor name
Sponsor Phone	Editable	Bid sponsor phone
Sponsor Email	Editable	Bid sponsor email

Project Location

Location where the project will occur

Field Name	Access	Description
Address	Editable	The location of the building, including the street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact name.
State/Province	Editable	The state or province of the building
City	Editable	The city where the building is located
State/Province - Other	Editable	If you are selecting a country without defined states, provinces, or regions, use this field to provide additional information.
Country	Editable	The country where the building is located
Zip/Postal Code	Editable	Enter the ZIP or postal code of the building.

Bid Scope

Bid scope that the bidders will need to respond to the bid

Field Name	Access	Description
Bid Scope	Editable	Scope of the bid

Instructions

Instructions to the bidder to complete the bid proposal

Field Name	Access	Description
Bidder Instructions	Editable	Additional instructions for

Field Name	Access	Description
		the bidder to create and submit its proposal

Vendor Requirements

Qualifications and additional bid details that the bidders will need to respond to the bid

Field Name	Access	Description
Qualifications	Editable	Required qualifications for this bid
Certifications	Editable	Certification requirements for this bid
Insurance Coverage	Editable	Insurance coverage requirements for this bid

Bid Meeting Details

Information about where the bid meeting will be held, if required

Field Name	Access	Description
Location	Editable	Address where an in-person meeting will be held
Date and Time	Editable	Date and time of the meeting
Dial-In Instructions	Editable	Instructions for vendors who must attend virtually instead of physically

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Request for Bid Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
RFB Date Picker UDF 1	Disabled	Reserved for future use by your organization
RFB Date Picker UDF 2	Disabled	Reserved for future use by your organization
RFB Decimal UDF 1	Disabled	Reserved for future use by your organization
RFB Decimal UDF 2	Disabled	Reserved for future use by your organization
RFB Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
RFB Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
RFB Currency Amount UDF 1	Disabled	Reserved for future use by your organization
RFB Currency Amount UDF 2	Disabled	Reserved for future use by your organization
RFB Picker UDF 1	Disabled	Reserved for future use by your organization
RFB Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Request for Bid Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
RFB Text 255 UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
RFB Text 255 UDF 2	Disabled	Reserved for future use by your organization
RFB Text 255 UDF 3	Disabled	Reserved for future use by your organization
RFB Text 255 UDF 4	Disabled	Reserved for future use by your organization
RFB Long Text UDF 1	Disabled	Reserved for future use by your organization
RFB Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Request for Bid is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.

Consolidating Line Items

Forecast line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Purchase Order
- Request for Bid
- Request for Bid Unsealed
- Risk

- Work Release

Completing the Bid Items tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.
Override Options Permitted	Editable	Indicates whether the bidder can change the Quantity or Unit of Measure, or both.
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the unit of measure to be used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Completing the Bid Items tab

General

Field Name	Access	Description
Requester Short Description	Read-Only	Requester short description
Bidder Short Description	Editable	A short description for this line item
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.
Override Options Permitted	Read-Only	Indicates whether the bidder can change the Quantity or Unit of Measure, or both.

Field Name	Access	Description
Estimated Quantity	Read-Only	Estimated quantity
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the unit of measure to be used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Completing the Winning Bid tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.
Cost Line Item Type	Editable	Enter the cost line item type.
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the unit of measure to be used for the Unit Quantity and Cost Per Unit amounts
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Contract Business Process

Use the Contracts business process to manage the commitment with a vendor, typically for services, and track key information about the commitment, such as the type of contract and detailed cost information. This business process supports retainage against both work and stored materials.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Contract business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Contract business process might create the following business processes: Notice to Proceed

The Contract business process might be created by the following business processes: Request for Bid, Request for Bid Unsealed

Creating a Contract Record

Create a Contract record by navigating to Commitments / Contract on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Contract task that has been assigned to you from the Tasks log.

Complete the Contract form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Commitments**, and then select **Contract**.
3) On the Contract 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.

6) On the **Workflow Action Details** tab, select who should receive this Contract.
    - If permitted, you can add users to the CC list. These users will receive a notification about this Contract but are not assigned a task.
    - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Contract Form

Key Information

Key information about this Contract is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Vendor	Required	Select the vendor for this record.
Contract Number	Editable	The unique number for the contract, which might come from a corporate financial system
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Enter the description or scope of this contract. This information might appear in any formal printouts of this contract.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for

Field Name	Access	Description
		auto-creation will copy this detailed description to the destination business process.

Contract Details

Details about the contract should be entered below.

Field Name	Access	Description
Contract Type	Editable	Type of contract
Priority	Editable	Priority of this record
Effective Date	Required	Enter the date this record takes effect.
Original Contract Completion Date	Editable	Target completion date of the contract
Spec Section	Editable	Specification section
Revised Contract Completion Date	Editable	Current target completion date based on all approved change orders
Unit Cost Contract	Editable	Specifies whether the system should freeze and copy unit price information onto a Change Order or Payment Application

Financial Summary

The following information provides a full snapshot of the approved contract.

Field Name	Access	Description
Percentage Complete to Date (D / C)	Read-Only	Percentage of contract completed
A. Original Commitment	Read-Only	Amount of original contract
B. Total Approved Change Orders	Read-Only	Total amount of all approved change orders
C. Revised Commitment (A+B)	Read-Only	Revised contract amount
D. Total Completed and Stored to Date	Read-Only	Payment Application total value for the Completed and Stored to Due, including line items

Field Name	Access	Description
E. Total Work Retainage	Read-Only	Payment Application total value for the Work Retainage, including line items
F. Total Stored Materials Retainage	Read-Only	Payment Application total value for the Stored Materials Retainage, including line items
G. Total Retainage (E + F)	Read-Only	Payment Application total value for the Retainage, including line items
H. Total Earned Less Retainage (D - G)	Read-Only	Total amount earned, after subtracting Retainage
I. Total Previous Payments	Read-Only	Total of all previous payments against the contract
J. Last Approved Payment Application	Read-Only	Amount of last approved Payment Application
K. Balance to Finish Including Retainage (C - I - J)	Read-Only	Remaining balance to finish, including Retainage

Retention and Billing

The information below defines how the billing for this contract will be managed. The information is automatically filled based on your project settings.

Field Name	Access	Description
Work Retainage %	Editable	Percentage retained for work or services. The default value is set in the project setting. Can be changed at the contract-level or contract-line-item-level.
Stored Materials Retainage %	Editable	Percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.
Vendor Preferred Payment	Editable	Preferred payment terms for

Terms		this vendor. The value is populated from the selected vendor.
Payment Terms	Editable	Payment terms (in days) for this contract

Vendor Information

Details of the Vendor for this Contract. If the Vendor has Unifier Essentials users, be sure to select the primary contact here so that they can see the contract.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Editable	Populates based on the selected Vendor. Can be manually completed if no Vendor record exists. **Note:** The Vendor ID in the Vendor Business Process will be populated from an external system.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main

Field Name	Access	Description
		vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this Contract

Field Name	Access	Description
Vendor Address to Use	Required	Address to use for this transaction. By default, the vendor's primary address is used.
Alternate Vendor Address	Editable	Alternate address listed for this Vendor
Address	Read-Only	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	City
State/Province	Read-Only	State or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

MWBE Tracking

Track the Minority-owned and Women-owned Business Enterprises (MWBE) participation on this contract.

Field Name	Access	Description
MWBE Project Target	Read-Only	The target Minority-owned and Women-owned Business Enterprises (MWBE) participation for the project.
Designations	Editable	Special designations

Field Name	Access	Description
		applicable to this business
MWBE Contract Target %	Editable	Value of the Target for Minority-owned and Women-owned business enterprises (MWBE) for this contract
MWBE Contract Actual %	Read-Only	The actual MWBE percentage (MWBE Contract Actual Amount / Total Completed and Stored to Date)
MWBE Contract Target Amount	Read-Only	Target contract amount to be designated as MWBE for the contract
MWBE Contract Actual Amount	Read-Only	Total amount of MWBE designated payments for all approved Payment Applications

(Internal) Contract Primary Contact

Specify the main internal contact for this contract. By default, this is set to the record creator. Their contact information will be used to fill the remaining fields.

Field Name	Access	Description
Main Contact	Editable	Name of internal main contact for this contract
E-Mail	Read-Only	Email of the primary contact
Mobile Phone	Read-Only	Mobile phone number of the primary contact
Work Phone	Read-Only	Work phone number of the primary contact

Notice to Proceed

To create a Notice to Proceed (NTP) business process automatically upon approval of this Contract, select the checkbox in this section. The NTP date is updated by completion of the NTP workflow.

Field Name	Access	Description
Create a Notice to Proceed?	Editable	If selected, automatically creates a Notice to Proceed (NTP) upon approval of the

Field Name	Access	Description
		Contract.
Notice to Proceed Date	Editable	The date on which any NTP is issued by the Owner in accordance with the terms of the referenced Contract
Notice to Proceed Creator	Read-Only	Link to the created NTP record

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record
Unit Quantity	Editable	The default unit quantity used for any line items that are added to this record
Cost per Unit	Read-Only	The cost per unit amount divided by the unit quantity, for the initial budget

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Contract Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Contract Date Picker UDF 1	Disabled	Reserved for future use by your organization
Contract Date Picker UDF 2	Disabled	Reserved for future use by your organization
Contract Decimal UDF 1	Disabled	Reserved for future use by your organization
Contract Decimal UDF 2	Disabled	Reserved for future use by your organization
Contract Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Contract Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Contract Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Contract Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Contract Picker UDF 1	Disabled	Reserved for future use by your organization
Contract Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Contract Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Contract Text 255 UDF 1	Disabled	Reserved for future use by your organization
Contract Text 255 UDF 2	Disabled	Reserved for future use by your organization
Contract Text 255 UDF 3	Disabled	Reserved for future use by your organization
Contract Text 255 UDF 4	Disabled	Reserved for future use by your organization
Contract Long Text UDF 1	Disabled	Reserved for future use by your organization
Contract Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Contract is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Contract line items can be consolidated from the following business processes:

- Budget Change

- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Standard tab

General

Specify a cost code for this Contract line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Contract Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter a description for this Contract line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250

Field Name	Access	Description
		characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Retainage

By default, the retainage is set at the Contract level. If you would like to override the percentages for any line items, you can do so here.

Field Name	Access	Description
Work Retainage %	Editable	The percentage retained for work or services. The default value is set in the project setting. Can be changed at the contract-level or contract-line-item-level.
Stored Materials Retainage %	Editable	The percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.

Additional Information

Enter additional information specific to this Contract line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Contract Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Purchase Order Business Process

Use the Purchase Order business process to track the commitment approval process of an order for goods or services.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Purchase Order business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Purchase Order Record

Create a Purchase Order record by navigating to Commitments / Purchase Order on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Purchase Order task that has been assigned to you from the Tasks log.

Complete the Purchase Order form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Commitments**, and then select **Purchase Order**.
3) On the Purchase Order 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.

6) On the **Workflow Action Details** tab, select who should receive this Purchase Order.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Purchase Order but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Purchase Order Form

Key Information

Key information about this purchase order (PO) is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Vendor	Required	Select the vendor for this PO.
PO Number	Editable	The unique number for the PO, which might come from a corporate financial system
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Enter the description or scope of this PO. This information might appear in any formal printouts of this contract.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Purchase Order Details

Details about the PO should be entered below.

Field Name	Access	Description
Payment Terms	Editable	Payment terms (in days) for this PO
Priority	Editable	Priority of this record
Effective Date	Required	Enter the date this record takes effect.
Expiry Date	Editable	Expiration date of the invoice, PO, or PO Amendment
Delivery Date	Editable	Date when the purchased goods should be delivered
Delivery Method	Editable	Indicates whether there is a preferred delivery or transportation method
Spec Section	Editable	Specification section

Deliver To

The following information identifies the location and contact person for delivery.

Field Name	Access	Description
Purchase Order Main Contact	Editable	Primary contact for the PO
E-Mail	Editable	Email address of the primary contact
Mobile Phone	Editable	Phone number of the primary contact
Work Phone	Editable	Phone number of the primary contact
Delivery Recipient Name	Editable	Name of the recipient for the delivery
Delivery Address	Editable	Delivery address, including the street address, P.O. Box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
Delivery City	Editable	City
Delivery Country	Editable	Country

Field Name	Access	Description
Delivery State/Province	Editable	State or Province
Delivery Zip/Postal Code	Editable	ZIP Code or postal code

Vendor Information

Details of the Vendor for this PO. If the Vendor has Unifier Essentials users, be sure to select the primary contact here so that they can see the PO.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Required	Indicates whether the vendor should be CCed when the PO is approved. CCing the vendor lets the vendor see the PO, with some restrictions.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this PO

Field Name	Access	Description
Vendor Address to Use	Required	Address to use for this transaction. By default, the vendor's primary address is used.
Alternate Vendor Address	Editable	Alternate address listed for this Vendor
Address	Read-Only	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	City
State/Province	Read-Only	State or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Unit of measure used for the unit-quantity and cost-per-unit amounts
Unit Quantity	Editable	Unit quantity that should be used to calculate the Cost per Unit
Cost per Unit	Read-Only	The total cost divided by the unit quantity

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Purchase Order Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
PO Date Only UDF 1	Disabled	Reserved for future use by your organization
PO Date Only UDF 2	Disabled	Reserved for future use by your organization
PO Decimal Amount UDF 1	Disabled	Reserved for future use by your organization
PO Decimal Amount UDF 2	Disabled	Reserved for future use by your organization
PO Date & Time UDF 1	Disabled	Reserved for future use by your organization
PO Date & Time UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
PO Currency Amount UDF 1	Disabled	Reserved for future use by your organization
PO Currency Amount UDF 2	Disabled	Reserved for future use by your organization
PO Picker UDF 1	Disabled	Reserved for future use by your organization
PO Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Purchase Order Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
PO Text 255 UDF 1	Disabled	Reserved for future use by your organization
PO Text 255 UDF 2	Disabled	Reserved for future use by your organization
PO Text 255 UDF 3	Disabled	Reserved for future use by your organization
PO Text 255 UDF 4	Disabled	Reserved for future use by your organization
PO Long Text UDF 1	Disabled	Reserved for future use by your organization
PO Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this PO is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the

Field Name	Access	Description
		record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Purchase Order line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the PO Lines tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Purchase Order Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter additional information specific to this Purchase Order line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this Purchase Order line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
PO Line Item UDF CA 1	Disabled	The PO Line Item UDF CA 1 field is reserved for future use by your organization.
PO Line Item UDF DA 1	Disabled	The PO Line Item UDF DA 1 field is reserved for future use by your organization.
PO Line Item Text 255 UDF 1	Disabled	The PO Line Item Text 255 UDF 1 field is reserved for future use by your organization.
PO Line Item UDF PD 1	Disabled	The PO Line Item UDF PD 1 field is reserved for future use by your organization.

Work Release Business Processes

Use the Work Release business process to connect to a Master Service Agreement Business Process that is deployed at the company level.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Work Release business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Work Release Record

Create a Work Release record by navigating to Commitments / Work Release on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Work Release task that has been assigned to you from the Tasks log.

Complete the Work Release form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Commitments**, and then select **Work Release**.
3) On the Work Release 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.

6) On the **Workflow Action Details** tab, select who should receive this Work Release.
    - If permitted, you can add users to the CC list. These users will receive a notification about this Work Release but are not assigned a task.
    - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

    The record moves to the next step in the workflow.

Completing the Work Release Form

Key Information

Key information about this Work Release

Field Name	Access	Description
Reference MSA	Required	Enter the Master Service Agreement contract number and title.
Effective Date	Required	Enter the date this record takes effect.
Title	Required	Enter a title.
Vendor Name	Editable	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Work Release Number	Editable	The unique Work Release number, which might come from a corporate financial system
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Description or scope of this Work Release. This information might appear in any formal printouts.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

MSA Details

Details from the referenced MSA

Field Name	Access	Description
MSA Contract Type	Read-Only	The contract vehicle that is used for the Master Servicers Agreement (MSA)
Priority	Read-Only	Priority of this record
MSA Effective Date	Read-Only	The work release Master Servicers Agreement (MSA) effective date
Contract Completion Date	Read-Only	Target completion date of the contract
Payment Terms	Read-Only	Payment terms (in days) for this contract

Vendor Information

Details of the Vendor for this MSA

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to

Field Name	Access	Description
		the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this MSA

Field Name	Access	Description
Vendor Address to Use	Read-Only	The vendor address to use for this transaction. By default, the vendor's primary address is used.
Address	Read-Only	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.

Field Name	Access	Description
City	Read-Only	City
State/Province	Read-Only	The state or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Currency

If the currency of this Work Release is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency

Field Name	Access	Description
		other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Work Release line items can be consolidated from the following business processes: Work Release

Completing the Standard tab

General

Specify a cost code for this Work Release line item.

Field Name	Access	Description
Reference MSA Line item	Required	Reference the line item from the Master Service Agreement (MSA).
Cost Code	Required	Enter a cost code.

Work Release Details

Cost for this Work Release line item. This can be entered as either lump sum or unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Description for this Work Release line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Notice to Proceed

Use the Notice to Proceed (NTP) business process to provide a Contractor with formal notice to commence work related to a Contract.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Completed	terminal status
Contractor_Review	non-terminal status
In_Review	non-terminal status
Pending	non-terminal status

Workflow

The default workflow for the Notice to Proceed business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Notice to Proceed Record

Create a Notice to Proceed record by navigating to Commitments / Notice to Proceed on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Notice to Proceed task that has been assigned to you from the Tasks log.

Complete the Notice to Proceed form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Commitments**, and then select **Notice to Proceed**.
3) On the Notice to Proceed 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Notice to Proceed.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Notice to Proceed but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Notice to Proceed Form

Key Information

Select an approved Contract.

Field Name	Access	Description
Contract	Required	The contract that is a reference to this record
Contract Number	Read-Only	The unique number for the contract, which might come from a corporate financial system
Title	Required	Enter a title.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Notice to Proceed Date	Required	The date on which any Notice to Proceed is issued by the Owner in accordance with the terms of the referenced Contract

Description

The Detailed Description field will appear as a portion of the Custom Print for this Notice to Proceed

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Contract Details

Details about the referenced contract

Field Name	Access	Description
Effective Date	Read-Only	Enter the date this record takes effect.
Original Contract Completion Date	Read-Only	The target completion date of the original contract, prior to any change orders
Original Commitment	Read-Only	Original amount of the referenced Contract as of the NTP creation date
Revised Contract Completion Date	Read-Only	The latest contract completion date, based on all approved change orders
Revised Commitment	Read-Only	Revised amount of the referenced Contract including approved Change Orders as of the NTP creation date
Manual Notice to Proceed Completion Date	Editable	The NTP completion date will be the Original or Revised Contract Completion date. You can manually update the completion date here.

Field Name	Access	Description
Notice to Proceed Completion Date	Read-Only	The date of completion for the NTP

Project Address

Field Name	Access	Description
Location	Read-Only	The location of the project
Address	Read-Only	The location of the building, including the street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	The city where the building is located
Country	Read-Only	The country where the building is located
State/Province	Read-Only	The state or province of the building
Zip/Postal Code	Read-Only	The ZIP or postal code of the building
City	Read-Only	The city where the building is located
State/Province - Other	Read-Only	If you are selecting a country without defined states, provinces, or regions, use this field to provide additional information.

Vendor Information

Details of the Vendor for this Contract. If the Vendor has Unifier Essentials users, the primary contact is specified to allow them to see the Notice to Proceed.

Field Name	Access	Description
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Read-Only	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Read-Only	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Read-Only	First name of the main vendor contact
Vendor Contact Last Name	Read-Only	Last name of the main vendor contact
Vendor Contact Phone	Read-Only	Phone number of the main vendor contact
Contact Email	Read-Only	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this Contract

Field Name	Access	Description
Vendor Address to Use	Read-Only	The vendor address to use for this transaction. By default, the vendor's primary address is used.
Address	Read-Only	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	City
State/Province	Read-Only	The state or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

Additional Information

The Notice to Proceed Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Notice to Proceed Date Picker UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Date Picker UDF 2	Disabled	Reserved for future use by your organization
Notice to Proceed Decimal UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Decimal UDF 2	Disabled	Reserved for future use by your organization
Notice to Proceed Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Notice to Proceed Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Currency	Disabled	Reserved for future use by

Field Name	Access	Description
Amount UDF 2		your organization
Notice to Proceed Picker UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Notice to Proceed Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Notice to Proceed Text 255 UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Text 255 UDF 2	Disabled	Reserved for future use by your organization
Notice to Proceed Text 255 UDF 3	Disabled	Reserved for future use by your organization
Notice to Proceed Text 255 UDF 4	Disabled	Reserved for future use by your organization
Notice to Proceed Long Text UDF 1	Disabled	Reserved for future use by your organization
Notice to Proceed Long Text UDF 2	Disabled	Reserved for future use by your organization

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Change Management

Change Request Business Process

Use the Change Request business process to manage a potential change to a commitment with a vendor (Contract). It tracks key information about the change, such as the reason and amount, and is frequently a precursor to a formal Change Order.

Change requests can be created manually or they can be automatically created from other business processes such as, Architect's Supplemental Instructions (ASIs), Issues, or Requests for Information (RFIs). A Change Directive or Change Order can be created from a Change Request.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Change Request business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Change Request business process might create the following business processes: Change Directive, Change Order

The Change Request business process might be created by the following business processes: Architect's Supplemental Instructions, Issue, Request for Information

Creating a Change Request Record

Create a Change Request record by navigating to Change Management / Change Request on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Change Request task that has been assigned to you from the Tasks log.

Complete the Change Request form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Change Management**, and then select **Change Request**.
3) On the Change Request 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Change Request.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Change Request but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Change Request Form

Key Information

Key information about this Change Request is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Contract	Required	Contract that is a reference to this record
Change Reason	Required	Reason for this change

Field Name	Access	Description
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Create a Change Order?	Editable	Use this field to create a change order automatically, upon approval of this record.

Description

Enter the description or scope of this Change Request. This information might appear in any formal printouts of this Change Request.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Change Request Details

Details about the Change Request should be entered below.

Field Name	Access	Description
Schedule Impact (Days)	Editable	If available, provide an estimate for the number of additional days added by this change order.
Spec Section	Editable	Specification section
Need By Date	Editable	If applicable, the date when the change is needed

Cost and Schedule Information

Information about the cost and schedule impact of this Change Request. If this Change Request was created from another source (for example, from an RFI), the information will have carried over.

Field Name	Access	Description
Cost Impact	Editable	Indicates whether there is a cost impact
Schedule Impact	Editable	Indicates whether there is a schedule impact
Owner Cost Estimate	Editable	If there is a cost impact, this field shows the total amount of the cost impact.
Owner Schedule Impact Estimate (Days)	Editable	If the schedule is impacted, this field indicates the number of days that impact the schedule.
Cost Impact Notes	Editable	If there is a cost impact, describes the reason.
Schedule Impact Notes	Editable	Description of why the schedule is impacted, if a schedule impact is indicated.

Cost Tracking

Tracks the cost of this Change Request as it moves from the original estimate to the final negotiated price.

Field Name	Access	Description
Cost Tracking Method	Editable	Indicates whether the various costs should be tracked at the summary level (top-down) or rolled up from the line items (bottom-up)
Estimated Line Item Total	Read-Only	Estimated line item total for the change request
Estimated Amount	Editable	Original estimated amount for the change request
Estimated	Read-Only	Estimated amount for the change request
Vendor Suggested Date	Editable	Date when the

Field Name	Access	Description
		vendor-suggested amount was received
Vendor Suggested Line Item Total	Read-Only	Line items total for change request that the vendor suggested
Vendor Suggested Amount	Editable	Amount vendor submitted for the change request
Vendor Suggested	Read-Only	Change requests that the vendor suggested
Recommendation Date	Editable	Date when the recommended amount was added
Recommended Line Item Total	Read-Only	Amount recommended for the change request line items, prior to negotiations
Recommended Amount	Editable	Amount recommended for the change request, prior to negotiations
Recommended	Read-Only	Final amount recommended for the change request
Final Negotiated Date	Editable	Date when the final date was agreed on. This is the date on which final negotiations about the date were completed.
Final Negotiated Line Item Total	Read-Only	Final amount agreed for the total of change request line
Final Negotiated Amount	Editable	Final amount agreed with the vendor
Final Negotiated	Read-Only	Final amount agreed for the change request

Financial Summary

The information below provides a full snapshot of the Contract and the impact of this Change Request.

Field Name	Access	Description
A. Original Commitment	Read-Only	Amount of the original contract

Field Name	Access	Description
B. Previously Approved Change Orders	Read-Only	Total amount of all previously approved change orders
C. Amount Previous to this Change Order (A+B)	Read-Only	Revised amount of this contract, not including the current (or any pending) change orders
D. Current Request	Read-Only	Amount of this change order
E. Revised Contract Amount (C + D)	Read-Only	Revised contract amount upon approval of this change order

Reference Contract Details

The following details are pulled from the referenced contract.

Field Name	Access	Description
Contract Number	Read-Only	The unique number for the contract, which might come from a corporate financial system
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Contract Type	Read-Only	Type of contract
Effective Date	Read-Only	Enter the date this record takes effect.
Original Contract Completion Date	Read-Only	Target completion date of the original contract, prior to any change orders
Revised Contract Completion Date	Read-Only	Latest contract-completion date, based on all approved change orders
Work Retainage %	Read-Only	Percentage retained for work or services. The default value is set in the project setting. Can be changed at the Contract or

Field Name	Access	Description
		Contract line item level.
Stored Materials Retainage %	Read-Only	Percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.

Change Directive

To expedite the work and avoid or minimize delays in the work, which might affect the contract sum or contract time, a Change Directive can be created and sent to the Vendor.

Field Name	Access	Description
Create Change Directive	Editable	Use this field to create a Change Directive from this record immediately.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	Total cost divided by the unit quantity for this record

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The Change Request Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Change Order Date Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Date Picker UDF 2	Disabled	Reserved for future use by your organization
Change Order Decimal UDF 1	Disabled	Reserved for future use by your organization
Change Order Decimal UDF 2	Disabled	Reserved for future use by your organization
Change Order Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Change Order Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Change Order Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Change Order Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Change Request Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Change Order Text 255 UDF 1	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 2	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 3	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 4	Disabled	Reserved for future use by your organization
Change Order Long Text UDF 1	Disabled	Reserved for future use by your organization
Change Order Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Change Request is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Change Request line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Standard tab

General

Specify a cost code for this Change Request line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Change Request Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter a description for this Change Request line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Cost Tracking

If using "bottom-up" cost tracking for this Change Request, the amounts below should be used. They are then rolled up to the main form.

Field Name	Access	Description
Estimated Amount	Editable	Original estimated amount for the change request
Vendor Suggested Amount	Editable	Amount vendor submitted for the change request
Recommended Amount	Editable	Amount recommended for the change request, prior to

Field Name	Access	Description
		negotiations
Final Negotiated Amount	Editable	Final amount agreed with the vendor

Additional Information

Enter additional information specific to this Change Request line item.

Field Name	Access	Description
Spend Category	Editable	Select a spend category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Contract Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Consolidated?

If this line item has been consolidated into a Change Order, it will be indicated here.

Field Name	Access	Description
Consolidated?	Read-Only	

Change Directive Business Process

Use the Change Directive business process to authorize a Vendor to proceed with work as described in the record. This is frequently used in place of a zero-sum Change Order or as a placeholder that lets work begin while a formal Change Request or Change Order is being processed.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Acknowledged	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Contractor_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Change Directive business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Change Directive business process might create the following business processes: Not applicable

The Change Directive business process might be created by the following business processes: Change Request

Creating a Change Directive Record

Create a Change Directive record by navigating to Change Management / Change Directive on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Change Directive task that has been assigned to you from the Tasks log.

Complete the Change Directive form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Change Management**, and then select **Change Directive**.
3) On the Change Directive 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Change Directive.

- If permitted, you can add users to the CC list. These users will receive a notification about this Change Directive but are not assigned a task.
- If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.

7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Change Directive Form

Key Information

Key information about this Change Directive is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Initiated By	Editable	Party that initiated the Change
Contract	Required	Contract that is a reference to this record
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Change Directive Number	Editable	Change directive number, if not using the system record-number for identification
Change Reason	Editable	Reason for this change
Effective Date	Editable	Enter the date this record takes effect.
Reference Change Request	Editable	Change Request reference for this Change Directive

Description

Enter a detailed description or scope of this Change Directive. This information might appear in any formal printouts of this Change Directive.

Field Name	Access	Description
Detailed Description	Editable	The detailed information about the short-description field. The field size can be

Field Name	Access	Description
		expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Proposed Adjustments

Information about the proposed price and schedule adjustments to the Contract

Field Name	Access	Description
Adjustment to Contract Sum	Required	Proposed basis of adjustment to the Contract sum
Amount	Editable	Dollar amount for the selected cost adjustment
Unit Price Amount	Editable	Unit Price Amount
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record.
Change Description	Editable	Description of the cost adjustment for this Change Directive, if needed
Change in Contract Time	Required	Change in Contract time for this Change Directive
Days	Editable	Number of days for the selected time adjustment

Vendor Information

Details of the Vendor who will receive this Change Directive. This information is pulled from the contract.

Field Name	Access	Description
Legal Vendor Name	Editable	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor Contact First Name	Editable	First name of the main vendor contact

Field Name	Access	Description
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor
Address	Editable	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
State/Province	Editable	The state or province
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Editable	Country
Zip/Postal Code	Editable	ZIP Code or postal code

Architect Information

Details of the Architect of Record (AoR) on this project. This information is pulled from the project record.

Field Name	Access	Description
AoR Vendor Name	Editable	Company name of the AoR
AoR Name	Editable	Name of the AoR
AoR Phone	Editable	Phone number of the AoR
AoR Email	Editable	Email address of the AoR
AoR Address	Editable	The AoR's address, include street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
AoR City	Editable	City for the AoR address
AoR State/Province	Editable	State or province of the

Field Name	Access	Description
		AoR
AoR State/Province - Other	Editable	If the AoR address includes a country without defined states, provinces, or regions, use this field to provide additional pertinent information.
AoR Country	Editable	The country for the Architect of Record (AoR) address
AoR Zip/Postal Code	Editable	The ZIP Code or postal code for the Architect of Record (AoR) address

Record Information

System information about this record.

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Change Directive Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Change Directive Date Picker UDF 1	Disabled	Reserved for future use by your organization
Change Directive Date Picker UDF 2	Disabled	Reserved for future use by your organization
Change Directive Decimal UDF 1	Disabled	Reserved for future use by your organization
Change Directive Decimal UDF 2	Disabled	Reserved for future use by your organization
Change Directive Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Change Directive Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Change Directive Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Change Directive Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Change Directive Picker UDF 1	Disabled	Reserved for future use by your organization
Change Directive Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Change Directive Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Change Directive Text 255 UDF 1	Disabled	Reserved for future use by your organization
Change Directive Text 255 UDF 2	Disabled	Reserved for future use by your organization
Change Directive Text 255 UDF 3	Disabled	Reserved for future use by your organization
Change Directive Text 255 UDF 4	Disabled	Reserved for future use by your organization
Change Directive Long Text UDF 1	Disabled	Reserved for future use by your organization
Change Directive Long Text UDF 2	Disabled	Reserved for future use by your organization

Change Order Business Process

Use the Change Order business process to manage a change to a commitment with a vendor (Contract) and track key information about the change, such as the reason and amount.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Change Order business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Change Order business process might create the following business processes: Not applicable

The Change Order business process might be created by the following business processes: Change Request

Creating a Change Order Record

Create a Change Order record by navigating to Change Management / Change Order on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Change Order task that has been assigned to you from the Tasks log.

Complete the Change Order form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Change Management**, and then select **Change Order**.

3) On the Change Order 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Change Order.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Change Order but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Change Order Form

Key Information

Key information about this Change Order is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Reference Commit	Required	Select the reference commitment (Contract, PO) for this transaction
Change Reason	Editable	The reason for this change
Amount	Read-Only	This field displays the amount.
Effective Date	Required	Enter the date this record takes effect.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Enter the description or scope of this Change Order. This information might appear in any formal printouts of this Change Order.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250

Field Name	Access	Description
		characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Change Order Details

Details about the Change Order should be entered below.

Field Name	Access	Description
Change Order # (Manual)	Editable	If not using the automatically numbered change orders, tracks a change order number here.
Vendor Change Order #	Editable	The vendor-specific change order number
Schedule Impact (Days)	Editable	If available, provide an estimate for the number of additional days added by this change order.
Revised Contract Completion Date	Editable	The new completion date of the Contract if this Change Order is approved
Change Order Version	Editable	This field is optional. If a previous change order has been rejected or canceled, an incremented version can be tracked in this field.

Financial Summary

The information below gives you a full snapshot of the Contract and the impact of this Change Order.

Field Name	Access	Description
A. Original Commitment	Read-Only	The amount of the original contract
B. Previously Approved	Read-Only	The total amount of all

Field Name	Access	Description
Change Orders		previously approved change orders
C. Amount Previous to this Change Order (A+B)	Read-Only	The revised amount of this contract, not including the current (or any pending) change orders
D. Current Request	Read-Only	The amount of this change order
Current CO % Increase (D / C)	Read-Only	The current change order amount increase, in percent, compared to the previous change order amount
E. Revised Contract Amount (C + D)	Read-Only	The revised contract amount upon approval of this change order
Total % Change Increase ((B+D)/A)	Read-Only	The percent increase of all change orders against the original contract amount

Reference Contract Details

Details about the referenced contract are entered below.

Field Name	Access	Description
Contract Number	Read-Only	The unique number for the contract, which might come from a corporate financial system
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Contract Type	Read-Only	The type of contract
Original Contract Completion Date	Read-Only	The target completion date of the original contract, prior to any change orders
Revised Contract Completion Date	Read-Only	The latest contract-completion date, based on all approved

Field Name	Access	Description
		change orders
Work Retainage %	Read-Only	The percentage retained for work or services. The default value is set in the project setting. Can be changed at the Contract level or Contract line-item level.
Stored Materials Retainage %	Read-Only	The percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.

Vendor Information

Details of the Vendor for this Contract. If the Vendor has Unifier Essentials users, be sure to select them here so that they can see the contract.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when

Field Name	Access	Description
		creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	Enter the first name of the main vendor contact.
Vendor Contact Last Name	Editable	Enter the last name of the main vendor contact.
Vendor Contact Phone	Editable	Enter the phone number of the main vendor contact.
Contact Email	Editable	Enter the email of the main vendor contact.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	Total cost divided by the unit quantity for this record

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The Change Order Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Change Order Date Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Date Picker UDF 2	Disabled	Reserved for future use by your organization
Change Order Decimal UDF 1	Disabled	Reserved for future use by your organization
Change Order Decimal UDF 2	Disabled	Reserved for future use by your organization
Change Order Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Change Order Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Change Order Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Change Order Picker UDF 1	Disabled	Reserved for future use by your organization
Change Order Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Change Order Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Change Order Text 255 UDF 1	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 2	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 3	Disabled	Reserved for future use by your organization
Change Order Text 255 UDF 4	Disabled	Reserved for future use by your organization
Change Order Long Text UDF 1	Disabled	Reserved for future use by your organization
Change Order Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Change Order is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Change Order line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Reference	Editable	Use this field to change an existing line in the Schedule of Values (SOV). After the record is approved, the line item will be updated to include the change made by this line item. If blank, a new line in the SOV will be created upon approval.
Originating Change Request	Read-Only	If this line item was consolidated from a change request, it will be displayed here. If your environment is configured to allow inclusion of previously consolidated line items and you are creating a second Change Order because the first one was canceled or rejected, this field includes the consolidated line items from the first Change Order. Only Change Requests that reference the same Contract will be available for line item consolidation.
Scheduled Value	Read-Only	The scheduled value of the referenced line item
Originating Potential Change Order	Read-Only	If this line item was consolidated from a Potential Change Order, it will be displayed here. Only Potential Change Orders that reference the same Contract will be available for line item consolidation.
Commits Remaining Balance	Read-Only	The remaining balance for the referenced SOV line item

Change Order Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	This field displays amount.

Description

Enter a description for this Change Order line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Retainage

By default, the retainage is set at the Contract level. If you want to override the percentages for any line items, you can do so here.

Field Name	Access	Description
Work Retainage %	Editable	The percentage retained for work or services. The default value is a project setting. Can be changed at the Contract level or Contract line-item level.
Stored Materials Retainage %	Editable	The percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract level or Contract line-item level.

Additional Information

Enter additional information specific to this Change Order line item.

Field Name	Access	Description
Spend Category	Editable	Select a spend category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Contract Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Potential Change Order Business Process

Use the Potential Change Order (PCO) business process to manage a possible change to a Contract. It tracks key information about the potential change, such as the reason and estimated amount. Potential Change Order line items can be consolidated (copied) to a formal Change Order.

Note: The PCO BP is usually initiated by an external user; internal users should use the Change Request BP to initiate change requests.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Inactive	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Potential Change Order business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Potential Change Order business process might create the following business processes: Not applicable

The Potential Change Order business process might be created by the following business processes: Request for Information

Creating a Potential Change Order Record

Create a Potential Change Order record by navigating to Change Management / Potential Change Order on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Potential Change Order task that has been assigned to you from the Tasks log.

Complete the Potential Change Order form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Change Management**, and then select **Potential Change Order**.
3) On the Potential Change Order 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Potential Change Order.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Potential Change Order but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Potential Change Order Form

Key Information

Key information about this Potential Change Order is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Reference Commit	Required	Select the reference commitment (Contract, PO) for this transaction
Change Reason	Editable	The reason for this change
Amount	Read-Only	This field displays the amount.
Due Date	Read-Only	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Enter the description or scope of this Potential Change Order. This information might appear in any formal printouts of this Potential Change Order.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Potential Change Order Details

Details about the Potential Change Order should be entered below.

Field Name	Access	Description
Need By Date	Editable	If applicable, enter the date by when the change is

Field Name	Access	Description
		needed.
Spec Section	Editable	Specification section

Proposed Contractor Cost & Schedule Information

Details about the contractor's proposed cost and schedule impact. Enter estimated amounts on line items. If this Potential Change Order was created from an RFI, the information will have carried over.

Field Name	Access	Description
Proposed Contractor Estimate (RFI)	Read-Only	If this PCO was auto-created, the Proposed Contractor Estimate from the RFI
Proposed PCO Estimate	Editable	The proposed total of line item amounts for this PCO record
Proposed Est. Schedule Impact (Days)	Editable	The proposed schedule impact in days, entered by the contractor
Proposed Cost Impact Notes	Editable	If cost is impacted, describe the reason.
Proposed Schedule Impact Notes	Editable	If schedule is impacted, describe the reason.

Financial Summary

The information below gives you a full snapshot of the Contract and the impact of this Potential Change Order.

Field Name	Access	Description
A. Original Commitment	Read-Only	The amount of the original contract
B. Previously Approved Change Order	Read-Only	The total amount of all previously approved Change Orders
C. Amount Previous to this Potential Change Order (A+B)	Read-Only	The revised amount of this contract, not including the current (or any pending) Potential Change Orders
D. Current Request	Read-Only	The amount of this Potential Change Order

Field Name	Access	Description
E. Revised Contract Amount (C + D)	Read-Only	The revised contract amount upon approval of a Change Order based on this Potential Change Order

Reference Contract Details

Details about the referenced contract are entered below.

Field Name	Access	Description
Contract Number	Read-Only	The unique number for the contract, which might come from a corporate financial system
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Contract Type	Read-Only	The type of contract
Effective Date	Read-Only	The date this record takes effect
Original Contract Completion Date	Read-Only	The target completion date of the original contract, prior to any change orders
Revised Contract Completion Date	Read-Only	The latest contract-completion date, based on all approved change orders
Work Retainage %	Read-Only	The percentage retained for work or services. The default value is set in the project setting. Can be changed at the Contract level or Contract line-item level.
Stored Materials Retainage %	Read-Only	The percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone

Field Name	Access	Description
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The Potential Change Order Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Potential Change Order Date Picker UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Date Picker UDF 2	Disabled	Reserved for future use by your organization
Potential Change Order Decimal UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Decimal UDF 2	Disabled	Reserved for future use by your organization
Potential Change Order Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Potential Change Order Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Potential Change Order Picker UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Potential Change Order Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Potential Change Order	Disabled	Reserved for future use by

Field Name	Access	Description
Text 255 UDF 1		your organization
Potential Change Order Text 255 UDF 2	Disabled	Reserved for future use by your organization
Potential Change Order Text 255 UDF 3	Disabled	Reserved for future use by your organization
Potential Change Order Text 255 UDF 4	Disabled	Reserved for future use by your organization
Potential Change Order Long Text UDF 1	Disabled	Reserved for future use by your organization
Potential Change Order Long Text UDF 2	Disabled	Reserved for future use by your organization

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	Total cost divided by the unit quantity for this record

Currency

If the currency of this Potential Change Order is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount.

Field Name	Access	Description
		This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Potential Change Order line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Line Items tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Field Name	Access	Description
Reference	Editable	Use this field to change an existing line in the Schedule of Values (SOV). After the record is approved, the line item will be updated to include the change made by this line item. If blank, a new line in the SOV will be created upon approval.

Potential Change Order Detail

Enter the cost for this line item as a lump sum or a unit rate. If the Contract is designated as Unit Cost, the unit rate will be fixed for referenced existing Contract line items.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Editable	Enter the item unit cost.
Estimated Amount	Read-Only	This field displays the original estimated amount for the change request.

Description

Enter a description for this Potential Change Order line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this Potential Change Order line item.

Field Name	Access	Description
Spend Category	Editable	Select a spend category.
Work Package	Editable	Select the Work Package that this item will roll up to.

Field Name	Access	Description
Contract Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF CA 1	Disabled	Reserved for future use by your organization
Contract Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Consolidated?

If this line item has been consolidated into a Change Order, it will be indicated here.

Field Name	Access	Description
Consolidated?	Read-Only	

PO Amendment Business Process

Use the PO Amendment business process to track the approval process for changes to a Purchase Order.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the PO Amendment business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a PO Amendment Record

Create a PO Amendment record by navigating to Change Management / PO Amendment on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing PO Amendment task that has been assigned to you from the Tasks log.

Complete the PO Amendment form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Change Management**, and then select **PO Amendment**.
3) On the PO Amendment 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this PO Amendment.
   - If permitted, you can add users to the CC list. These users will receive a notification about this PO Amendment but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the PO Amendment Form

Key Information

Key information about this PO Amendment

Field Name	Access	Description
Title	Required	Enter a title.
Reference Commit	Editable	Select the reference commitment (Contract, PO) for this transaction.
Change Reason	Editable	Enter the reason for this change.
Amount	Read-Only	Amount of this record or line item
Effective Date	Required	Enter the date this record

Field Name	Access	Description
		takes effect.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Enter the description or scope of this PO Amendment. This information might appear in any formal printouts of this record.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Financial Summary

The following information provides a full snapshot of the approved PO Amendment.

Field Name	Access	Description
A. Original PO Amount	Read-Only	The original Purchase Order amount. Displayed on the Purchase Order and related Invoice or Purchase Order Amendment.
B. Previously Approved Amendments	Read-Only	Total amount of all previously approved Purchase Order Amendments
C. Revised PO Amount (A+B)	Read-Only	Revised Purchase Order amount
D. Current Request	Read-Only	Amount of the current request invoice
E. Revised PO Amount (C+D)	Read-Only	Revised Purchase Order amount

Purchase Order Details

Details about the PO Amendment should be entered below.

Field Name	Access	Description
Payment Terms	Editable	Payment terms (in days) for this PO
Priority	Editable	Priority of this record
Spec Section	Editable	Specification section
Expiry Date	Editable	Expiration date of the invoice, PO, or PO Amendment
Delivery Date	Editable	Date when the purchased goods should be delivered
Delivery Method	Editable	Indicates whether there is a preferred delivery or transportation method

Deliver To

The following information identifies the location and contact person for delivery.

Field Name	Access	Description
Purchase Order Main Contact	Editable	Primary contact for the PO
E-Mail	Editable	Email address of the primary contact
Mobile Phone	Editable	Phone number of the primary contact
Work Phone	Editable	Phone number of the primary contact
Delivery Recipient Name	Editable	Name of the recipient for the delivery
Delivery Address	Editable	Delivery address, including the street address, P.O. Box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
Delivery City	Editable	City
Delivery Country	Editable	Country
Delivery State/Province	Editable	State or Province
Delivery Zip/Postal Code	Editable	ZIP Code or postal code

Vendor Information

Details of the Vendor for this PO Amendment. If the Vendor has Unifier Essentials users, be sure to select the primary contact here so that they can see the PO.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor Name	Read-Only	The name or nickname for this vendor. This field will be automatically filled if selecting a Vendor record or can be manually filled if no Vendor record exists.
Vendor a Unifier User?	Required	Indicates whether the vendor should be CCed when the PO is approved. CCing the vendor lets the vendor see the PO, with some restrictions.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this PO Amendment

Field Name	Access	Description
Vendor Address to Use	Read-Only	Address to use for this transaction. By default, the vendor's primary address is used.
Address	Read-Only	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	City
State/Province	Read-Only	State or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Editable	Unit of measure used for the unit-quantity and cost-per-unit amounts
Unit Quantity	Editable	Unit quantity that should be used to calculate the Cost per Unit
Cost per Unit	Read-Only	The total cost divided by the unit quantity

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The PO Amendment Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
PO Amendment Date Only UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Date Only UDF 2	Disabled	Reserved for future use by your organization
PO Amendment Currency Amount UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Currency Amount UDF 2	Disabled	Reserved for future use by your organization
PO Amendment Date & Time UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Date & Time UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
PO Amendment Decimal Amount UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Decimal Amount UDF 2	Disabled	Reserved for future use by your organization
PO Amendment Picker UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The PO Amendment Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
PO Amendment Text 255 UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Text 255 UDF 2	Disabled	Reserved for future use by your organization
PO Amendment Text 255 UDF 3	Disabled	Reserved for future use by your organization
PO Amendment Text 255 UDF 4	Disabled	Reserved for future use by your organization
PO Amendment Long Text UDF 1	Disabled	Reserved for future use by your organization
PO Amendment Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this PO Amendment is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the

Field Name	Access	Description
		record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

PO Amendment line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Issue
- Journal Entry
- PO Amendment
- Purchase Order
- Risk
- Work Release

Completing the PO Amendment Line Items tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Reference	Editable	Enter a reference for this record.

Field Name	Access	Description
Scheduled Value	Read-Only	The scheduled value of the referenced PO line item. This comes from the Schedule of Values (SOV) for the referenced PO and includes any adjustments coming from approved amendments.
Commits Remaining Balance	Read-Only	The remaining balance of the referenced PO line item. This comes from the Schedule of Values (SOV) for the referenced PO. The remaining balance includes approved amendments and invoices.

PO Amendment Details

Cost for this PO Amendment line item. The cost can be entered as either lump sum or unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	The default unit of measure used for any line items that are added to this record.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Description for this PO Amendment Line Item

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

Enter additional information specific to this PO Amendment Line Item

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
PO Line Item UDF CA 1	Disabled	Reserved for future use by your organization
PO Line Item UDF DA 1	Disabled	Reserved for future use by your organization
PO Line Item Text 255 UDF 1	Disabled	Reserved for future use by your organization
PO Line Item UDF PD 1	Disabled	Reserved for future use by your organization

Actuals

Actual Business Process

Use the Actual business process to create or import actuals. This could be for both direct and indirect costs on the Project.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Actual business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Actual business process might create the following business processes: Not applicable

The Actual business process might be created by the following business processes: Actuals Importer

Creating an Actual Record

Create an Actual record by navigating to Actuals / Actual on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Actual task that has been assigned to you from the Tasks log.

Complete the Actual form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Actual**.
3) On the Actual 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Actual.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Project Status but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Actual Form

Key Information

Key Information about this Actual record.

Field Name	Access	Description
Payment No.	Editable	Indicates the payment number, which might include the check number, wire number, electronic

Field Name	Access	Description
		funds transfer (EFT) number, and so on.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Title	Editable	Title of the record
Actual Type	Editable	Type of Actual, which is used for classification and reporting
Payment Date	Editable	Date of the payment
Payment Processed Date	Editable	Date the payment was processed by the finance department
Effective Date	Editable	Effective date will auto-populate on the line items for this record. Line item Effective Date can be used to assign transactions to cash flow periods.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Change description, assumptions, justification, and anything else needed for this Actual.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Vendor Information

Details of the Vendor for this Actual, if applicable

Field Name	Access	Description
Vendor	Editable	Select the vendor for this record.
Vendor Name	Editable	The name or nickname for this vendor. This field will be automatically filled if selecting a Vendor record or can be manually filled if no Vendor record exists.
Legal Vendor Name	Editable	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Editable	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Actual Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Actual Date Picker UDF 1	Disabled	Reserved for future use by your organization
Actual Date Picker UDF 2	Disabled	Reserved for future use by your organization
Actual Decimal UDF 1	Disabled	Reserved for future use by your organization
Actual Decimal UDF 2	Disabled	Reserved for future use by your organization
Actual Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Actual Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Actual Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Actual Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Actual Picker UDF 1	Disabled	Reserved for future use by your organization
Actual Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Actual Additional Notes section is reserved for future use by your organization.

Field Name	Access	Description
Actual Text 255 UDF 1	Disabled	Reserved for future use by your organization
Actual Text 255 UDF 2	Disabled	Reserved for future use by your organization
Actual Text 255 UDF 3	Disabled	Reserved for future use by your organization
Actual Text 255 UDF 4	Disabled	Reserved for future use by your organization
Actual Long Text UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Actual Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Actual is different from the project currency, specify it here. If you must override the project or base currency exchange rates, use the override fields.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.
Project Currency Rate Override	Editable	Overrides the project currency exchange rate for this record. This can only be specified on the first step of the workflow.
Base Currency Rate Override	Editable	Overrides the base currency exchange rate for this record. This can only be specified on the first step of the workflow.

Completing the Standard tab

General

Cost Code for this Actual line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Cost Name	Read-Only	Populates the code name of the selected cost code

Actual Details

Cost for this line item. This can be entered as either lump sum or unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	The unit-of-measure used when reporting costs per project unit
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Description for this Actual line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	Description of any additional information to the short description.

Additional Information

Additional information specific to this Actual line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category
Work Package	Editable	Select the Work Package that this item will roll up to.
Effective Date	Required	Enter the date this record takes effect.

Custom Fields

The Actual Line Item Custom Fields block is reserved for future use by your organization.

Field Name	Access	Description
Actual Line Item Picker UDF 1	Disabled	Reserved for future use by your organization
Actual Line Item Text 255 UDF 1	Disabled	Reserved for future use by your organization

Invoice Business Process

Use the Invoice business process to track the approval process for payments to the Purchase Order.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Invoice business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating an Invoice Record

Create an Invoice record by navigating to Actuals / Invoice on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Invoice task that has been assigned to you from the Tasks log.

Complete the Invoice form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Invoice**.
3) On the Invoice 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Invoice.
    - If permitted, you can add users to the CC list. These users will receive a notification about this Invoice but are not assigned a task.
    - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

    The record moves to the next step in the workflow.

Completing the Invoice Form

Key Information

Key information about this Invoice.

Field Name	Access	Description
Title	Required	Enter a title.
Reference Commit	Editable	Select the reference commitment (Contract, PO) for this transaction.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Amount	Read-Only	Total amount (sum of amounts for all line items)

Invoice Details

Details related to the Invoice

Field Name	Access	Description
Invoice Date	Editable	Indicates the last date of the

Field Name	Access	Description
		billing period covered by the payment application (also known as the Period To)
Payment Due Date	Read-Only	Date the payment is due
Vendor Invoice No	Editable	Vendor invoice number
Invoice Version	Editable	This field is optional. If a previous invoice has been rejected or canceled, increment the version in this field.

Financial Summary

The information below gives you a full snapshot of financials related to the Invoice.

Field Name	Access	Description
A. Original PO Amount	Read-Only	The original Purchase Order amount. Displayed on the Purchase Order and related Invoice or Purchase Order Amendment.
B. Previously Approved Amendments	Read-Only	Total amount of all previously approved Purchase Order Amendments
C. Revised PO Amount (A+B)	Read-Only	Revised Purchase Order amount
D. Previously Approved Invoices	Read-Only	Total amount of all previously approved invoices
E. PO Balance (C - D)	Read-Only	Current amount unpaid on the Purchase Order (ignoring the Invoice)
F. Current Request	Read-Only	Amount of the current request invoice
G. PO Balance upon Approval (E - F)	Read-Only	Current amount unpaid on the Purchase Order when the Invoice gets approved

Description

Enter the description or scope of this Invoice. This information might appear in any formal printouts of this Invoice.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Purchase Order Details

Specific details regarding this Purchase Order.

Field Name	Access	Description
Payment Terms	Editable	Payment terms (in days) for this contract
Priority	Editable	Priority of this record
PO Effective Date	Editable	Effective date for the Purchase Order or Invoice
Expiry Date	Editable	Invoice, Purchase Order, or Purchase Order Amendment expiration date
Delivery Date	Editable	Date when the purchased goods are to be delivered
Delivery Method	Editable	Indicates whether there is a preferred delivery or transportation method for the Purchase Order
Spec Section	Editable	Specification section

Deliver To

Provides delivery details on the location and contact regarding this Invoice

Field Name	Access	Description
Purchase Order Main Contact	Editable	The primary contact for the Purchase Order
E-Mail	Editable	Email of the primary contact
Mobile Phone	Editable	Mobile phone number of the primary contact
Work Phone	Editable	Work phone number of the primary contact
Delivery Recipient Name	Editable	Name of the recipient for

Field Name	Access	Description
		the delivery
Delivery Address	Editable	Delivery address, including the street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
Delivery City	Editable	City
Delivery Country	Editable	Country
Delivery State/Province	Editable	State or Province
Delivery Zip/Postal Code	Editable	ZIP Code or postal code

Unit Cost Information

Information on the cost per unit for this record. The Unit of Measure and Unit Quantity values are set to the project values by default.

Field Name	Access	Description
Unit of Measure	Read-Only	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Read-Only	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	Total cost divided by the unit quantity for this record

Payment Processing

Information about the actual payment to the Vendor. This information might come from your corporate financial system.

Field Name	Access	Description
Payment No.	Editable	Indicates the payment number, which may include the check number, wire number, electronic funds transfer (EFT) number, and so on.
Payment Date	Editable	Date of the payment
Payment Processed Date	Editable	Date the payment was processed by the finance

Field Name	Access	Description
		department

Vendor Information

Details of the Vendor for this Invoice. If the Vendor has Unifier Essentials users, be sure to select them here so that they can see the Invoice.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	Populates based on the selected Vendor. Can be manually completed if no Vendor record exists.
Vendor Name	Read-Only	Name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main

Field Name	Access	Description
		vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this Invoice

Field Name	Access	Description
Vendor Address to Use	Read-Only	Vendor address to use for this transaction. By default, the vendor's primary address is used.
Address	Read-Only	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Read-Only	City
State/Province	Read-Only	State or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was

Field Name	Access	Description
		created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Invoice Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Invoices Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Invoices Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Invoices Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Invoices Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Invoices Date Picker UDF 1	Disabled	Reserved for future use by your organization
Invoices Date Picker UDF 2	Disabled	Reserved for future use by your organization
Invoices Decimal UDF 1	Disabled	Reserved for future use by your organization
Invoices Decimal UDF 2	Disabled	Reserved for future use by your organization
Invoices Picker UDF 1	Disabled	Reserved for future use by your organization
Invoices Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Invoice Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Invoices Text 255 UDF 1	Disabled	Reserved for future use by your organization
Invoices Text 255 UDF 2	Disabled	Reserved for future use by your organization
Invoices Text 255 UDF 3	Disabled	Reserved for future use by your organization
Invoices Text 255 UDF 4	Disabled	Reserved for future use by your organization
Invoices Long Text UDF 1	Disabled	Reserved for future use by your organization
Invoices Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Invoice is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Completing the Invoice Line Items tab

General

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Commits Remaining Balance	Read-Only	The remaining balance for the selected PO SOV line item. This comes from the SOV for the referenced PO.

Invoice Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter a description for this Invoice Line Item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter any additional information to the short description. This field can be expanded if needed.

Additional Information

Enter additional information specific to this Invoice Line Item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Effective Date	Required	Enter the date this record

Field Name	Access	Description
		takes effect.
PO Line Item UDF CA 1	Disabled	Reserved for future use by your organization
PO Line Item UDF DA 1	Disabled	Reserved for future use by your organization
PO Line Item Text 255 UDF 1	Disabled	Reserved for future use by your organization
PO Line Item UDF PD 1	Disabled	Reserved for future use by your organization

Journal Entry Business Process

Use the Journal Entry business process to adjust spend line items. It is commonly used to reassign costs to alternate cost centers or general ledger (GL) codes.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Rejected	terminal status
Canceled	terminal status
Awaiting_Review	non-terminal status
Sent_for_Revision	non-terminal status
Pending_Approval	non-terminal status

Workflow

The default workflow for the Journal Entry business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Journal Entry Record

Create a Journal Entry record by navigating to Actuals / Journal Entry on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Journal Entry task that has been assigned to you from the Tasks log.

Complete the Journal Entry form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Journal Entry**.
3) On the Journal Entry 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Journal Entry.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Journal Entry but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Journal Entry Form

Key Information

Key information about this Journal Entry is provided below.

Field Name	Access	Description
Title	Required	Enter a title for this record.
Amount	Read-Only	Amount of this record or line item
Journal Entry Reason	Editable	The reason for the journal entry
Journal Entry Version	Editable	This field is optional. If a previous journal entry has been rejected or canceled, increment the version in this field.
Effective Date	Required	Enter the date this record takes effect.
Due Date	Editable	Target completion date for this record. A default

Field Name	Access	Description
		duration has been set by your administrator but can be overridden here for this record.

Reference Commitment

If this Journal Entry references a Contract or PO, select it below.

Field Name	Access	Description
Contract Reference	Editable	The contract reference number
PO Number	Editable	The Purchase Order number in the Journal Entry

Description

Enter a change description, assumptions, justification, and anything else needed for this Journal Entry.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned-record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Journal Entry Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Journal Entry Date Picker UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Date Picker UDF 2	Disabled	Reserved for future use by your organization
Journal Entry Decimal UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Decimal UDF 2	Disabled	Reserved for future use by your organization
Journal Entry Date Picker UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Date Picker UDF 2	Disabled	Reserved for future use by your organization
Journal Entry Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Journal Entry Line Item Picker UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Journal Entry Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Journal Entry Text 255 UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Journal Entry Text 255 UDF 2	Disabled	Reserved for future use by your organization
Journal Entry Text 255 UDF 3	Disabled	Reserved for future use by your organization
Journal Entry Text 255 UDF 4	Disabled	Reserved for future use by your organization
Journal Entry Long Text UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Journal Entry is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Journal Entry line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order

- Change Request
- Contract
- Estimate
- Forecast
- Initial Budget
- Invoice
- Journal Entry
- PO Amendment
- Potential Change Order
- Purchase Order
- Risk
- Work Release

Completing the Standard tab

General

Specify a cost code for this Journal Entry line item.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Journal Entry Details

Enter the cost for this line item as a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	The unit-of-measure used when reporting costs per project unit
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter additional information specific to this Journal Entry line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	Description of any additional information to the

Field Name	Access	Description
		short description

Additional Information

Enter additional information specific to this Journal Entry line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Effective Date	Required	Enter the date this record takes effect.

Custom Fields

The Journal Entry Line Item Custom Fields block is reserved for future use by your organization.

Field Name	Access	Description
Journal Entry Line Item Picker UDF 1	Disabled	Reserved for future use by your organization
Journal Entry Text 255 UDF 1	Disabled	Reserved for future use by your organization

Miscellaneous Cost Business Process

Use the Miscellaneous Cost business process to track costs that are not linked to commitments or otherwise tracked by other cost business processes.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status

Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Miscellaneous Cost business process is set up in a certain way; however, your organization might use it differently. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Miscellaneous Cost Record

Create a Miscellaneous Cost record by navigating to Actuals / Miscellaneous Cost on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Miscellaneous Cost task that has been assigned to you from the Tasks log.

Complete the Miscellaneous Cost form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Miscellaneous Cost**.
3) On the Miscellaneous Cost 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Miscellaneous Cost.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Miscellaneous Cost but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Miscellaneous Cost Form

Key Information

Key Information about this Miscellaneous Cost record

Field Name	Access	Description
Payment No.	Editable	Indicates the payment number, which might

Field Name	Access	Description
		include the check number, wire number, electronic funds transfer (EFT) number, and so on.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Title	Editable	Title of the record
Miscellaneous Cost Type	Editable	Type of Miscellaneous Cost, which is used for classification and reporting
Effective Date	Editable	Enter the date this record takes effect.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Change the description, assumptions, justification, and anything else needed for this Miscellaneous Cost.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Vendor Information

Details of the Vendor for this Miscellaneous Cost, if applicable

Field Name	Access	Description
Vendor	Editable	Select the vendor for this record.
Vendor Name	Editable	The name or nickname for this vendor. This field will be automatically completed if you select a Vendor record,

Field Name	Access	Description
		or you can manually enter it if no Vendor record exists.
Legal Vendor Name	Editable	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Editable	Populates based on the selected Vendor. Can be manually completed if no Vendor record exists.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Miscellaneous Cost Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Miscellaneous Cost Date Picker UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Date Picker UDF 2	Disabled	Reserved for future use by your organization
Miscellaneous Cost Decimal UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Decimal UDF 2	Disabled	Reserved for future use by your organization
Miscellaneous Cost Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Miscellaneous Cost Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Miscellaneous Cost Picker UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Miscellaneous Cost Additional Notes section is reserved for future use by your organization.

Field Name	Access	Description
Miscellaneous Cost Text 255 UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Text 255 UDF 2	Disabled	Reserved for future use by your organization
Miscellaneous Cost Text 255 UDF 3	Disabled	Reserved for future use by your organization
Miscellaneous Cost Text 255 UDF 4	Disabled	Reserved for future use by your organization
Miscellaneous Cost Long Text UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Miscellaneous Cost is different from the project currency, specify it here. If you must override the project or base currency exchange rates, use the override fields.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.
Project Currency Rate Override	Editable	Overrides the project currency exchange rate for this record. This can only be specified on the first step of the workflow.
Base Currency Rate Override	Editable	Overrides the base currency exchange rate for this record. This can only be specified on the first step of the workflow.

Consolidating Line Items

Miscellaneous Cost line items can be consolidated from the following business processes:

- Actual
- Budget Change
- Change Order
- Change Request
- Contract
- Estimate

- Forecast
- Initial Budget
- Invoice
- Journal Entry
- Miscellaneous Cost
- PO Amendment
- Purchase Order
- Timesheet

Completing the Standard tab

General

Cost Code for this Miscellaneous Cost line item

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Miscellaneous Cost Details

Cost for this line item. This can be entered as either a lump sum or a unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	The unit-of-measure used when reporting costs per project unit
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Description for this Miscellaneous Cost line item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	Enter any additional information to the short description. This field can be expanded.

Additional Information

Additional information specific to this Miscellaneous Cost line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.
Effective Date	Required	

Custom Fields

The Miscellaneous Cost Line Item Custom Fields block is reserved for future use by your organization.

Field Name	Access	Description
Miscellaneous Cost Line Item Picker UDF 1	Disabled	Reserved for future use by your organization
Miscellaneous Cost Line Item Text 255 UDF 1	Disabled	Reserved for future use by your organization

Payment Application Business Process

Use the Payment Application business process to submit and approve payments to a commitment with a vendor (Contract). Usually only one Payment Application record for a specific Contract can be in process at any time.

Special Behaviors

For more information about using this business process (BP), such as working with Base Commits and Change Commits or importing and exporting information, see **Payment Application Business Processes** in the *Unifier Essentials Business Processes Reference Guide*.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status

Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Payment Application business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Payment Application Record

Create a Payment Application record by navigating to Actuals / Payment Application on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Payment Application task that has been assigned to you from the Tasks log.

Complete the Payment Application form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Payment Application**.
3) On the Payment Application 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Payment Application.
    - If permitted, you can add users to the CC list. These users will receive a notification about this Payment Application but are not assigned a task.
    - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Payment Application Form

Key Information

Key information about this Payment Application is provided below.

Field Name	Access	Description
Title	Required	Enter a title for the record.
Reference Commit	Required	Select the reference commitment (Contract) for this transaction.
Vendor Pay App No	Required	The vendor Payment Application number
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Payment Application Details

Details about this Payment Application.

Field Name	Access	Description
Invoice Date	Required	Indicates the last date of the billing period covered by the payment application (also known as the Period To)
Payment Due Date	Editable	The date the payment is due
Period Start	Editable	The start date for the Payment Application being billed
Period End	Editable	The end date for the Payment Application being billed
Payment Application Version	Editable	This field is optional. If a previous Payment Application has been rejected or canceled, you can increment the version in this field.

Financial Summary

Financial snapshot of the Contract and the impact of this Payment Application. It will be updated after the Payment Application Lines are updated.

Field Name	Access	Description
A. Original Commitment	Read-Only	The amount of the original contract
B. Total Approved Change Orders	Read-Only	The total amount of all approved Change Orders
C. Revised Commitment (A+B)	Read-Only	The revised Contract amount
Percentage Complete to Date (D / C)	Read-Only	The Total Completed and Stored to Date divided by the Revised Commitment
D. Total Completed and Stored to Date	Read-Only	The Payment Application total value for the Completed and Stored to Date, including the line items
Work Retainage %	Read-Only	The percentage retained for work or services. The default value is set in the project setting. Can be changed at the Contract level or Contract line-item level.
E. Total Work Retainage	Read-Only	The Payment Application total value for the Work Retainage, including the line items
Stored Materials Retainage %	Read-Only	The percentage retained on stored materials. The default value is a project setting. Can be changed at the Contract or Contract line item level.
F. Total Stored Materials Retainage	Read-Only	The Payment Application total value for the Stored Materials Retainage, including the line items
G. Total Retainage (E + F)	Read-Only	The Payment Application total value for the Retainage, including the line items
H. Total Earned Less Retainage (D - G)	Read-Only	The total amount that is earned, after subtracting the

Field Name	Access	Description
		retainage
I. Total Previous Payments	Read-Only	The total of all previous payments against this contract
J. Current Payment Due	Read-Only	The current payment due date, from the line items of the Payment Application
K. Balance to Finish Including Retainage (C - I - J)	Read-Only	The balance to finish, including the retainage for this Contract

Description

Enter the description of this Payment Application. This information might appear in any formal printouts of this Payment Application.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Reference Contract Details

Details about the referenced contract are shown below.

Field Name	Access	Description
Contract Number	Read-Only	The unique number for the contract, which might come from a corporate financial system
Vendor Name	Read-Only	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Contract Type	Read-Only	The type of contract
Payment Terms	Read-Only	The payment terms (in days) for this contract
Original Contract	Read-Only	The target completion date

Field Name	Access	Description
Completion Date		of the original contract, prior to any change orders
Revised Contract Completion Date	Read-Only	The latest contract-completion date, based on all approved change orders

Change Order Details

Summary of the Change Orders against this Contract

Field Name	Access	Description
Add Change Orders	Read-Only	The sum of any positive Change Orders since the last Payment Application
Deduct Change Orders	Read-Only	The sum of any negative Change Orders since the last Payment Application
Previous Add Change Orders	Read-Only	The sum of previous positive Change Orders
Previous Deduct Change Orders	Read-Only	The sum of previous negative Change Orders
This Period Add Change Orders	Read-Only	The sum of the Add Change Orders minus the Previous Add Change Orders
This Period Deduct Change Orders	Read-Only	The sum of the Deduct Change Orders minus the Previous Deduct Change Orders

Vendor Information

Details of the Vendor for this Payment Application. If the Vendor has Unifier Essentials users, be sure to select them here so that they can see the contract.

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Read-Only	If Unifier Essentials is

Field Name	Access	Description
		integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address from the Contract

Field Name	Access	Description
Address	Read-Only	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include contact name
City	Read-Only	City

Field Name	Access	Description
State/Province	Read-Only	The state or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

MWBE Tracking

Tracks the Minority/Women-owned Business Enterprise (MWBE) eligible amount for this Payment Application

Field Name	Access	Description
Eligible Designations	Read-Only	MWBE designations eligible for this contract
MWBE Eligible Amount	Editable	Amount eligible for MWBE designation

Payment Processing

Information about the actual payment to the Vendor. This information might come from a corporate financial system.

Field Name	Access	Description
Payment No.	Editable	Indicates the payment number, which might include the check number, wire number, electronic funds transfer (EFT) number, and so on.
Payment Date	Editable	Date of the payment
Payment Processed Date	Editable	Date the payment was processed by the finance department

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number

Field Name	Access	Description
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Payment Application Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Payment Application Date Picker UDF 1	Disabled	Reserved for future use by your organization
Payment Application Date Picker UDF 2	Disabled	Reserved for future use by your organization
Payment Application Decimal UDF 1	Disabled	Reserved for future use by your organization
Payment Application Decimal UDF 2	Disabled	Reserved for future use by your organization
Payment Application Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Payment Application Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Payment Application Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Payment Application Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Payment Application Picker	Disabled	Reserved for future use by

Field Name	Access	Description
UDF 1		your organization
Payment Application Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Payment Application Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Payment Application Text 255 UDF 1	Disabled	Reserved for future use by your organization
Payment Application Text 255 UDF 2	Disabled	Reserved for future use by your organization
Payment Application Text 255 UDF 3	Disabled	Reserved for future use by your organization
Payment Application Text 255 UDF 4	Disabled	Reserved for future use by your organization
Payment Application Long Text UDF 1	Disabled	Reserved for future use by your organization
Payment Application Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Payment Application is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.

Field Name	Access	Description
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Completing the Payment Application Lines tab

Primary Section

Lists all the key information typically needed on a Payment Application continuation sheet.

Field Name	Access	Description
B1. Description (from Commitment)	Read-Only	The description of this Payment Application
C. Scheduled Value	Read-Only	The scheduled value of this Payment Application. This comes from the original contract and includes any adjustments coming from approved change orders.
D. Work Previously Completed	Read-Only	The sum of completed work covered by the previous payment application (columns D & E from the previous application). Values from column F (Materials Presently Stored) from the previous application may have been automatically moved here.
E. Work Completed this Period	Required	The work performed during the current pay period, including the value of materials incorporated in the project that were listed on the previous payment application under Materials Presently Stored (column F).
F. Materials Presently Stored	Editable	The value of materials presently stored for which payment is sought. This value covers both materials newly stored for which payment is sought and

Field Name	Access	Description
		materials previously stored that are not yet incorporated into the project. Mere payment by the Owner for stored materials does not result in a deduction from this column. Only as materials are incorporated into the project is their value deducted from this column and incorporated into column E.
G1. Tot Compl & Stored to Date (D+E+F)	Read-Only	The total value of all previously completed work, work completed this period, and materials presently stored
G2. Percentage Complete (G1 / C)	Read-Only	The Total Completed and Stored to Date divided by the Schedule of Value (SOV)
H. Balance to Finish (C-G1)	Read-Only	The Schedule of Value (SOV) minus the Total Completed and Stored to Date (column G1)
Work Retainage %	Editable	The percentage retained for work or services. This value is inherited from the SOV and should only be changed with approval from the Owner.
Stored Materials Retainage %	Editable	The percentage retained on stored materials. This value is inherited from the SOV and should only be changed with approval from the Owner.

Retainage Details

Information about the Retainage on this Payment Application line item

Field Name	Access	Description
Total Retainage to Date	Read-Only	The total Retainage to date,

Field Name	Access	Description
		including this transaction (Work and Stored Materials)
Previous Retainage Released	Read-Only	The retainage previously released, from the Schedule of Value (SOV)
Retainage Released (This Period)	Editable	Total value of retainage being released in the current Payment Application
Retainage Balance	Read-Only	The sum of the Total Retainage to Date minus the Total Retainage Released, including this period

Additional SOV Data

Remainder of the SOV fields

Field Name	Access	Description
Total Earned Less Retainage	Read-Only	The sum of the Total Completed and Stored to Date minus the Retainage Balance
Total Previous Payments	Read-Only	The total Previous Payments against this Contract, from the Schedule of Value (SOV)
Current Payment Due	Read-Only	The current payment due date, based on the Total Earned Less Retainage minus the Total Previous Payments
Balance to Finish including Retainage	Read-Only	The balance to Finish including Retainage, based on the Scheduled Value minus Total Earned Less Retainage

Remarks

Additional remarks about this item.

Field Name	Access	Description
Additional Comments	Editable	Any additional comments

Field Name	Access	Description
		about the payment being requested this period

Owner Information

Information used by the Owner to track costs.

Field Name	Access	Description
Cost Code	Required	For *owner* use only. Enter a cost code for this line item.
Code Name	Read-Only	Populates the code name of the selected cost code
Change Order # (Manual)	Read-Only	If not using the automatically numbered change orders, tracks a change order number here.
Effective Date	Required	Enter the date this record takes effect.
Breakdown	Editable	Any breakdowns provided at the SOV level for each referenced Contract line item

Stored Materials Moved / Not Moved

Displays whether any stored materials were automatically moved over to Work Previously Completed, based on the "Keep Stored Materials" setting.

Field Name	Access	Description
Stored Materials (Moved)	Read-Only	Displays the value of Materials Presently Stored (column F) from the previous period that were automatically moved to the Work Previously Completed (column D) in this period.
Stored Materials (Not Moved)	Read-Only	Displays the value of Materials Presently Stored (column F) from the previous period that were carried over to the current period. The value of any materials that have been incorporated into the Project

Field Name	Access	Description
		should be manually deducted from Materials Presently Stored (column F) and added to Work Completed this Period (column E).

Project Management

Action Item Business Process

Use the Action Item business process to create, manage, and track key information such as assignments and dates. Action items are often auto-created from other business process records, such as Meeting Minutes.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Completed	terminal status
Awaiting_Review	non-terminal status
Pending	non-terminal status

Workflow

The default workflow for the Action Item business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Issue business process might create the following business processes: Not applicable

The Issue business process might be created by the following business processes: Meeting Minutes, Risk, Warranty

Creating an Action Items Record

Create an Action Item record by navigating to Project Management / Action Item on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Action Item task that has been assigned to you from the Tasks log.

Complete the Action Item form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Action Item**.
3) On the Action Item 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Action Item.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Action Item but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Action Form

Key Information

Key information about this Action Item

Field Name	Access	Description
Title	Required	Enter a title.
Assigned To	Required	The action item will be assigned to this user for resolution on the next step of the workflow.
Action Item Priority	Editable	An integer value representing the priority of the action item
Due Date	Required	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

This information might appear in any formal printouts of this action item. This information will typically be filled out by the person who is assigned to the Action Item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Details

Field Name	Access	Description
Brief Summary of Actions Taken	Editable	Brief summary of actions taken
Notes	Editable	Any additional notes

External Assignment

Field Name	Access	Description
External Contact?	Editable	Indicates whether the contact is a user in the system
External Contact Name	Editable	The name of the contact who is *not* a user in the system
External Company Name	Editable	The name of the company of the contact who is not a user in the system
Contact Email	Editable	The contact email address for the main vendor

Action Item Dates

Field Name	Access	Description
Target Completion Date	Editable	The target completion date for the action item. To be updated as needed, especially when reassigning the Action Item.

Related Meeting Minutes

If the Action Item was created through a Meeting Minutes business process, it will be tracked in the following fields.

Field Name	Access	Description
Meeting Minutes Number	Read-Only	Reference meeting minutes number if Action Item generated from a meeting
Business Item Group	Read-Only	Used to categorize the meeting minutes line items as main topics so grouping can be used for views and reporting purposes
Business Item Number	Read-Only	Used to provide a manual numbering schema alternatively from the system line item number
Meeting Minutes Line Item	Read-Only	Reference Line item if Action Item generated from a Meeting

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the project was created
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Read-Only	Status of the project

Additional Information

The Action Item Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Action Items Date Picker UDF 1	Disabled	Reserved for future use by your organization
Action Items Date Picker UDF 2	Disabled	Reserved for future use by your organization
Action Items Decimal UDF 1	Disabled	Reserved for future use by your organization
Action Items Decimal UDF 2	Disabled	Reserved for future use by your organization
Action Items Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Action Items Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Action Items Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Action Items Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Action Items Picker UDF 1	Disabled	Reserved for future use by your organization
Action Items Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Action Item Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Action Items Text 255 UDF 1	Disabled	Reserved for future use by your organization
Action Items Text 255 UDF 2	Disabled	Reserved for future use by your organization
Action Items Text 255 UDF 3	Disabled	Reserved for future use by your organization
Action Items Text 255 UDF 4	Disabled	Reserved for future use by your organization
Action Items Long Text UDF 1	Disabled	Reserved for future use by your organization
Action Items Long Text UDF 2	Disabled	Reserved for future use by your organization

Communication Business Process

Use the Communication business process to track correspondence that occurs amount project-related parties outside of Unifier Essentials. Correspondence might occur through email, fax, telephone, blog, events, social meetings, social media, and so on.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Open	non-terminal status
Closed	non-terminal status

Creating a Communication Record

Create a Communication record by navigating to Project Management / Communication on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Communication form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Communication**.
3) On the Communication page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Communication Form

Key Information

Key information about this Communication

Field Name	Access	Description
Title	Required	Enter a title.
Status	Required	Select a status.
Communication Type	Editable	Type for this communication. This feeds the auto-sequence number in the Record Information

Field Name	Access	Description
		block.
Reason	Editable	Reason for this communication
Social Media Type	Editable	Indicates whether this communication pertains to social media and, if so, indicates the type of social media.
Initiator	Editable	Initiator of this communication
Initiating Company	Editable	Name of the initiating company for this communication
Recipient	Editable	Recipient of this communication
Receiving Company	Editable	Name of the recipient company for this communication

Source URL Reference

Link to a conversation thread or other relevant information

Field Name	Access	Description
Source URL Reference	Editable	If applicable, indicate the source URL.

Description

Description of this communication

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Email Details

Enter e-Mail correspondence details in this section, if applicable.

Field Name	Access	Description
Date Email Sent	Editable	Date this communication was sent
Follow-up Requested	Editable	Indicates whether the email follow-up was requested
Email From	Editable	Email address from which the email will be sent
Follow-up Date	Editable	If an email follow-up is requested, a follow-up date is required.
Email To	Editable	Email address to which the email will be sent
CC	Editable	Recipients of a carbon copy (CC) of an email
BCC	Editable	Recipients of blind carbon copy (BCC) of an email

Message Details

Key content related to the details of the communication

Field Name	Access	Description
Message Body	Editable	Record messages or include content from an email.
Response	Editable	Response of this communication
Conversation Thread (OPTIONAL)	Editable	This field is optional. This is an alternative to email messaging (message and response). Store the entire threaded conversation in one place.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record

Field Name	Access	Description
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the project was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Communication Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Communications Date Picker UDF 1	Disabled	Reserved for future use by your organization
Communications Date Picker UDF 2	Disabled	Reserved for future use by your organization
Communications Decimal UDF 1	Disabled	Reserved for future use by your organization
Communications Decimal UDF 2	Disabled	Reserved for future use by your organization
Communications Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Communications Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Communications Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Communications Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Communications Picker UDF 1	Disabled	Reserved for future use by your organization
Communications Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Communication Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Communications Text 255 UDF 1	Disabled	Reserved for future use by your organization
Communications Text 255 UDF 2	Disabled	Reserved for future use by your organization
Communications Text 255 UDF 3	Disabled	Reserved for future use by your organization
Communications Text 255 UDF 4	Disabled	Reserved for future use by your organization
Communications Long Text UDF 1	Disabled	Reserved for future use by your organization
Communications Long Text UDF 2	Disabled	Reserved for future use by your organization

Issue Business Process

Use the Issue business process to track issues on a project, which may or may not include costs. Issues can be created from many other business processes, such as Risk or RFI, and may in turn create Change Requests.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Closed_Cost_Impact	terminal status
Closed_No_Imp	terminal status
Closed_SchedCost_Imp	terminal status
Closed_Sched_Impact	terminal status
Awaiting_Review	non-terminal status
Open	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Issue business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Issue business process might create the following business processes: Change Request

The Issue business process might be created by the following business processes: Daily Report, Meeting Minutes, Request for Information, Risk

Creating an Issue Record

Create an Issue record by navigating to Project Management / Issue on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Issue task that has been assigned to you from the Tasks log.

Complete the Issue form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Issue**.
3) On the Issue 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Issue.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Issue but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Issue Form

Key Information

Enter the main information about the issue.

Field Name	Access	Description
Title	Required	Enter a title.
Amount	Read-Only	Total amount (sum of amounts for all line items)
Issue Priority	Editable	The priority of the issue
Issue Severity	Editable	The severity of the issue
Identified By	Editable	The person who has identified the risk
Identified Date	Editable	The date the risk was identified
Contract	Editable	The contract that is a reference to this record
Spec Section	Editable	Specification section
Exclude from Reporting?	Editable	Used to exclude this record from some project or organizational reports

Description

Enter a brief description of the issue and provide further details on the long description field.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Resolution

Enter information about how and when this issue is expected to be resolved. After it is resolved, you can specify the date it was resolved.

Field Name	Access	Description
Forecasted Resolution Date	Editable	The date when the issue threat has been eliminated, is no longer present, or is resolved independently
Notes	Editable	Any additional notes
Actual Resolution Date	Editable	Actual date of Issue Resolution

Cost & Schedule Estimates

Identify the total estimated impact in terms of cost and schedule that may have this issue. The figures are the sum of all the estimates of all the line items.

Field Name	Access	Description
Cost Impact	Editable	Indicates whether there is a cost impact
Schedule Impact	Editable	Indicates whether there is a schedule impact
Owner Cost Estimate	Editable	If there is a cost impact, this field shows the total amount of the cost impact.
Owner Schedule Impact Estimate (Days)	Editable	If the schedule is impacted, this field indicates the number of days that impact the schedule.
Cost Impact Notes	Editable	If there is a cost impact, describe the reason.
Schedule Impact Notes	Editable	Description of why the schedule is impacted, if a schedule impact is indicated

Change Request

The fields below determine whether or not a Change Request Record will be automatically created after this issue is closed.

Field Name	Access	Description
Create a Change Request?	Editable	Change request will be auto-created with the selection of the Contract as a requirement to = Yes.
Change Request Record	Read-Only	Link to the created Change Request record, after created from an Issue
Change Reason	Editable	The reason for this change

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number

Field Name	Access	Description
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The Issue Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Issues Date Picker UDF 1	Disabled	Reserved for future use by your organization
Issues Date Picker UDF 2	Disabled	Reserved for future use by your organization
Issues Decimal UDF 1	Disabled	Reserved for future use by your organization
Issues Decimal UDF 2	Disabled	Reserved for future use by your organization
Issues Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Issues Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Issues Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Issues Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Issues Picker UDF 1	Disabled	Reserved for future use by your organization
Issues Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Issue Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Issues Text 255 UDF 1	Disabled	Reserved for future use by your organization
Issues Text 255 UDF 2	Disabled	Reserved for future use by your organization
Issues Text 255 UDF 3	Disabled	Reserved for future use by your organization
Issues Text 255 UDF 4	Disabled	Reserved for future use by your organization
Issues Long Text UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Issues Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Issue is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Issue line items can be consolidated from the following business processes:

- Issue
- Risk

Completing the Standard tab

Issue Information

Cost breakdown for this Issue line item

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Field Name	Access	Description
Cost Impact	Editable	Cost impact of this issue line item

Description

Description for this Issue line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Meeting Minutes Business Process

Use the Meeting Minutes business process to capture project-related meeting minutes, track unresolved items, launch follow-up action items, and track progress between meetings. It often acts as the source of Action Item business process records.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Completed	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Meeting Minutes business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Note: Meeting attendees are automatically copied on the final step of the Meeting Minutes workflow. You can disable this in the workflow setup if necessary.

Related Processes

The Meeting Minutes business process might create the following business processes: Action Item, Issue

The Meeting Minutes business process might be created by the following business processes: Not applicable

Creating a Meeting Minutes Record

Create a Meeting Minutes record by navigating to Project Management / Meeting Minutes on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Meeting Minutes task that has been assigned to you from the Tasks log.

Complete the Meeting Minutes form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Meeting Minutes**.
3) On the Meeting Minutes 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **Meeting Minutes**.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Meeting Minutes but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Meeting Minutes Form

Key Information

Key information about this meeting is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Meeting Date Start Time	Editable	The date and time when the meeting starts
Meeting Type	Required	The meeting type. This feeds the auto-sequence number in the Record Information block.
Meeting Date End Time	Editable	The date and time when the meeting ends
Is Recurring?	Editable	Indicates whether the meeting is recurring
Meeting Location	Editable	The location of the meeting
Meeting Minutes Number	Editable	The meeting minutes number for this meeting

Details

Meeting Minute details for this meeting

Field Name	Access	Description
Overview	Required	General overview, or goal, of the meeting
Agenda	Required	The meeting agenda
Meeting Notes	Editable	The meeting notes

Meeting Statistics

Field Name	Access	Description
# of Business Items	Read-Only	The total number of business line items
# of Invited Attendees	Read-Only	The total number of invited attendees
# in Attendance	Read-Only	The number of attendees in the meeting

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record

Field Name	Access	Description
		number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Meeting Minutes Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Meeting Minutes Date Picker UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Date Picker UDF 2	Disabled	Reserved for future use by your organization
Meeting Minutes Decimal UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Decimal UDF 2	Disabled	Reserved for future use by your organization
Meeting Minutes Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Meeting Minutes Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Currency Amount UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Meeting Minutes Picker UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Meeting Minutes Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Meeting Minutes Text 255 UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Text 255 UDF 2	Disabled	Reserved for future use by your organization
Meeting Minutes Text 255 UDF 3	Disabled	Reserved for future use by your organization
Meeting Minutes Text 255 UDF 4	Disabled	Reserved for future use by your organization
Meeting Minutes Long Text UDF 1	Disabled	Reserved for future use by your organization
Meeting Minutes Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Attendees tab

Invited Attendee Information

Lists individuals invited to the meeting. For users of the system, they are selected from a list. For individuals not identified within the system, the information is manually entered.

Field Name	Access	Description
Invited Attendee (selector)	Editable	Allows picking attendees who are based on the internal users set up in the system.
Attendee Name	Required	Name of the attendee
Company	Editable	Company by which the attendee is employed
In Attendance?	Editable	Indicates whether the invited attendee is in

Field Name	Access	Description
		attendance
Include in next meeting?	Editable	Include whether the attendee is to be invited in next meeting
E-Mail	Editable	Email address of the attendee

Completing the Business Items tab

General

Field Name	Access	Description
Business Item Group	Editable	Used to categorize the meeting minutes line items as main topics so the grouping can be used for views and reporting purposes.
Business Item Number	Editable	Used to provide a manual numbering schema alternatively from the system line item number.
Title	Required	Enter the Business Item title.
Business Item Type	Editable	The business line item type: One-time item or standing agenda item
Priority	Editable	Business Item Priority
Business Item Status	Editable	The business process line item status, if an action item is not selected

Description

Enter a brief description of the business item and provide further details on the detailed description field.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description

Field Name	Access	Description
		field. The field size can be expanded.

Follow Up Action Required

At the conclusion of the meeting if further action is necessary, the details below are applicable.

Note: If an external assignee is involved, a Unifier Essentials assignee is also required, as the latter will be responsible for completing the action within the system on behalf of the external assignee.

Field Name	Access	Description
Further Action Required?	Editable	Determine whether an action item is required for this meeting minute item.
Action Item Record	Read-Only	Link to the created Action Item record, after it is created
Target Completion Date	Editable	The target completion date for the action item
Assigned To	Editable	The action item will be assigned to this user for resolution on the next step of the workflow.
Company	Read-Only	
Action Item Priority	Editable	An integer value representing the priority of the action item
External Contact?	Editable	Indicates whether the contact is a user in the system
External Contact Name	Editable	Name of the contact who is not a user in the system
External Company Name	Editable	Name of the company of the contact who is not a user in the system
Contact Email	Editable	The contact email address for the main vendor

Issue

If it is decided that an Issue should be created for this business item, enter the information here.

Field Name	Access	Description
Create Issue?	Editable	Determine if an issue should be created for this meeting minute item.
Issue Record	Read-Only	Link to the created Issue record, after it is created
Issue Priority	Editable	The priority of the issue
Issue Severity	Editable	The severity of the issue
Identified By	Editable	The person who has identified the risk
Identified Date	Editable	The date the risk was identified

Permit Business Process

Use the Permit business process to manage owner permit applications. You can use the business process to track key information about the permit application and the awarded permit, if applicable. You can also track permit-related inspections through line items.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Completed	terminal status
In_Review	non-terminal status

Workflow

The default workflow for the Permit business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Permit business process might create the following business processes: Not applicable

The Permit business process might be created by the following business processes: Not applicable

Creating a Permit Record

Create a Permit record by navigating to Project Management / Permit on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Permit task that has been assigned to you from the Tasks log.

Complete the Permit form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Permit**.
3) On the Permit 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **Permit**.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Permit but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Permit Form

Key Information

Key information about this permit record

Field Name	Access	Description
Title	Required	Enter a title.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Permit Type	Required	The type of work that is being permitted
Area	Editable	The area, from a list of

Field Name	Access	Description
		physical areas, related to this project or building
Administrative Division	Required	Select the agency that will issue the permit. This selection will determine where attachments are published to the Project Document Manager
Spec Selection	Editable	Specification section
Permit Duration	Required	Indicates whether this permit will be annual or for the entire project
Is this a public works project?	Editable	This field is optional. Indicates whether this permit is for a public works project.
Partnership or joint venture application?	Editable	This field is optional. Indicates whether this project is part of a partnership or joint venture.
Is this a temporary permit	Editable	This field is optional. Indicates whether this permit will be temporary.
Application Partner	Editable	If the project is part of a partnership or joint venture, identify the partner.

Previous Permit

Details about previous permits

Field Name	Access	Description
Have permits for any project covered by this permit application	Editable	Indicates whether portions of this work were previously permitted
Previous Permit Number	Editable	Identification number of the previously issued permit
Issuing office	Editable	If previously permitted, identify the issuing office.

Field Name	Access	Description
Previous Permit Date	Editable	If previously permitted, identify the date of the previous permit.
Awardee name	Editable	If previously permitted, identify the name of the entity issued the permit.

Key Dates

Key Dates for the permit

Field Name	Access	Description
Request Date	Editable	The date the permit was requested
Target Permit Obtaining Date	Editable	The planned date of permit issuance
Date Permit Obtained	Editable	The date the permit was issued
Permit Valid From	Editable	Start date of the permitted period
Permit Valid To	Editable	End date of the permitted period
Permitted Year	Editable	If the permit is annual, select the year.
Permit Extension	Editable	If this application is for an extension to an existing permit, select this checkbox.
Extended permit end date	Editable	If this application is for a permit extension, enter the extended end date.

Permit Requirements

Requirements for the permit

Field Name	Access	Description
Permit Renovation Required?	Editable	Indicates whether the work being performed is a renovation that requires a permit
Permit Package	Editable	A description of the

Field Name	Access	Description
Composition		materials submitted for the permit. Attach additional files to this record.
Permit Inspection Required?	Editable	Indicates whether the permitted work will require inspection. Inspection details may be added to line items on this record.
Permit Documentation Attached?	Editable	Indicates whether backup documentation related to this permit is attached to this record. Attached files will be published to the Document Manager for the Project.

Permit Application

Permit application details

Field Name	Access	Description
Permit Requested By	Editable	Who is requesting the permit?
Department Contacted	Editable	Department where permit application is submitted
Permit Responsible	Editable	Unifier Essentials user responsible for the permit application
Department Contact Name	Editable	Department contact to whom the application is submitted
Permit Requested by Other Details	Editable	If **Other** is selected for **Permit Requested By**, provide detailed information.
Permit Application Version	Editable	This field is optional. If a previous fund appropriation has been rejected or canceled, you can increment the version in this field.

Field Name	Access	Description
Permit Application Comments	Editable	Additional comments on the permit application
Issuer Website	Editable	Link to issuer department website

Permit Application Contractor

Permit application contractor details

Field Name	Access	Description
Contractor Representative Name	Editable	If the permit request is by a specialty contractor, provide the representative's name.
Contractor Representative Email	Editable	If the permit request is by a specialty contractor, provide the representative's email.
Contractor Representative Title	Editable	If the permit request is by a specialty contractor, provide the representative's title.
Contractor Representative Phone	Editable	If the permit request is by a specialty contractor, provide the representative's phone number.
Contractor License Number	Editable	If the permit request is by a specialty contractor, provide the contractor's license number.
Contractor Representative Fax	Editable	If the permit request is by a specialty contractor, provide the contractor's fax number.

Issued Permit Details

Details about the issued permit

Field Name	Access	Description
Permit Not Required	Editable	If a permit for this scope of work is not required, select this option.
Permit Number	Editable	Identification number of the issued permit
Permit Cost	Editable	Cost of the issued permit

Field Name	Access	Description
Permit Agency Reference	Editable	Select the agency that will issue the permit.
Permit Posted Onsite	Editable	Indicates whether a physical copy of the permit is posted on the jobsite
Permit Issue Comments	Editable	Additional comments about the issued permit

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Permit Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Permit Date Picker UDF 1	Disabled	Reserved for future use by your organization
Permit Date Picker UDF 2	Disabled	Reserved for future use by your organization
Permit Decimal UDF 1	Disabled	Reserved for future use by

Field Name	Access	Description
		your organization
Permit Decimal UDF 2	Disabled	Reserved for future use by your organization
Permit Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Permit Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Permit Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Permit Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Permit Picker UDF 1	Disabled	Reserved for future use by your organization
Permit Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Permit Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Permit Text 255 UDF 1	Disabled	Reserved for future use by your organization
Permit Text 255 UDF 2	Disabled	Reserved for future use by your organization
Permit Text 255 UDF 3	Disabled	Reserved for future use by your organization
Permit Text 255 UDF 4	Disabled	Reserved for future use by your organization
Permit Long Text UDF 1	Disabled	Reserved for future use by your organization
Permit Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Inspection tab

Inspection Details

Lists individuals invited to the meeting. For users of the system, they are selected from a list. For individuals not identified within the system, the information is manually entered.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.
Inspection Item	Required	Item that is being inspected
Inspection Body	Editable	Entity performing the inspection
Inspection Stage	Editable	Is this a final inspection?
Inspection Method	Editable	Indicates the method of inspection

Inspection Status

Field Name	Access	Description
Inspection Status	Required	Current status of the inspection
Requested Inspection Date	Editable	The date requested for an inspection
Scheduled Inspection Date	Editable	The date for a scheduled inspection
Rescheduled Inspection Date	Editable	The date for a rescheduled inspection
Successful Inspection Date	Editable	The date for a successful inspection

Project Note Business Process

Use the Project Note business process to capture generic notes for a project, which are not tied to a business process.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Open	non-terminal status
Closed	non-terminal status

Creating a Project Note Record

Create a Project Note record by navigating to Project Management / Project Note on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Project Note form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Project Note**.
3) On the Project Note page, click **Create**. Complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Project Note Form

Key Information

Key Information about this Note

Field Name	Access	Description
Title	Required	Enter a title.
Note Type	Editable	Defines the type of Project Note. This feeds the auto-sequence number in the Record Information block.

Note

Field Name	Access	Description
Note	Editable	Main note content

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Required	Status of the project
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Project Status Business Process

The Project Status is typically filled in by the owner's project manager or owner's representative to report project health, status, trends, and risks to key stakeholders.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Project Status business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Project Status Record

Create a Project Status record by navigating to Project Management / Project Status on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Project Status task that has been assigned to you from the Tasks log.

Complete the Project Status form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Project Status**.
3) On the Project Status 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Project Status.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Project Status but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Project Status Form

Key Information

Key information about this Project Status is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Project Phase (Manual)	Editable	The phase for this project
Project % Complete	Editable	Percent complete for the overall project. This is entered manually and can be based on duration, costs, or progress.

Project Reporting

Reporting date and overall summary of the project Status

Field Name	Access	Description
Project Reporting Date	Required	The date the project status refers to

Field Name	Access	Description
Project Reporting Summary	Required	Brief description of the current project report
Project Reporting Detailed Summary	Editable	Detailed description of the status of the project at the time of reporting

Project Status Summary

Enter a summary of the information related to the following items.

Field Name	Access	Description
Budget Status	Editable	The status of the project in relation to the budget
Budget Summary	Editable	Brief description of the budget status for the project-status period
Schedule Status	Editable	The status of the project in relation to the schedule
Schedule Summary	Editable	Brief description of the schedule status for the project-status period
Cost Status	Editable	The status of the project in relation to the expected cost
Cost Summary	Editable	Brief description of the cost status for the project-status period
Risk Status	Editable	Indicate the risk designation for the project. This value updates the Project details.
Risk Summary	Editable	Brief description of the risk status for the project status period

Project Analysis and Plans

This block should provide an indication of what has been done during the last project status period and what will be done in the next period.

Field Name	Access	Description
Work Completed Last Period	Editable	Brief description of the work that has been completed since the last project-status

Field Name	Access	Description
		period
Opportunities and Challenges	Editable	Brief description of the opportunities and challenges for the report period
Recommended Actions	Editable	Brief description of the recommended actions to take during the next report period
Plans for Next Project Status Period	Editable	Brief description of the plans to complete for the next report period

Project Images

Add pictures showing the progress on this project, which will be included in the formal project status report. Additional images and documents can be added to the Attachments tab.

Field Name	Access	Description
Image 1	Editable	The attached Image #1.
Image 2	Editable	The attached image #2.

(Manual) Project Dates

These dates come from the Manual Project Dates block on the Project Details form and will update the Project Details form on approval of this Project Status record. If the project is linked to the Schedule on the Project Details, update the project Activity Sheet instead.

Field Name	Access	Description
Project Start Date	Editable	The actual start date of the project
Project End Date	Editable	The actual end date of the project
Project Planned Start Date	Editable	The planned start date for the project
Project Planned End Date	Editable	The planned end date for the project

Schedule Dates

Dates dynamically linked to the Schedule Dates block on the Project Details form that reflect the Activity Sheet in the project.

Field Name	Access	Description
Start Activity Name	Read-Only	Activity Name of the selected Start Activity/Milestone
Finish Activity Name	Read-Only	Activity Name of the selected Finish Activity/Milestone
Schedule Planned Start Date	Read-Only	Planned start date for the project, from the selected schedule activity/milestone
Schedule Planned End Date	Read-Only	Planned end date for the project, from the selected schedule activity/milestone
Schedule Actual Start Date	Read-Only	Actual start date for the project, from the selected schedule activity/milestone
Schedule Actual End Date	Read-Only	Actual end date for the project, from the selected schedule activity/milestone
Schedule Start Date	Read-Only	Start date for the project, from the selected schedule activity/milestone
Schedule End Date	Read-Only	Finish date for the project, from the selected schedule activity/milestone

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was

Field Name	Access	Description
		last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Project Status Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Project Status Date Picker UDF 1	Disabled	Reserved for future use by your organization
Project Status Date Picker UDF 2	Disabled	Reserved for future use by your organization
Project Status Decimal UDF 1	Disabled	Reserved for future use by your organization
Project Status Decimal UDF 2	Disabled	Reserved for future use by your organization
Project Status Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Project Status Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Project Status Picker UDF 1	Disabled	Reserved for future use by your organization
Project Status Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Project Status Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Project Status Text 255 UDF 1	Disabled	Reserved for future use by your organization
Project Status Text 255 UDF 2	Disabled	Reserved for future use by your organization
Project Status Text 255 UDF 3	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Project Status Text 255 UDF 4	Disabled	Reserved for future use by your organization
Project Status Long Text UDF 1	Disabled	Reserved for future use by your organization
Project Status Long Text UDF 2	Disabled	Reserved for future use by your organization

Project Timesheet Business Process

Use the Project Timesheet business process to track internal employee timesheet costs against a project. These records might be created automatically from the organization-level Timesheet business process.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Project Timesheet business process is set up in a certain way; however, your organization might use it differently. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Project Timesheet business process might create the following business processes: Not applicable

The Project Timesheet business process might be created by the following business processes: Timesheet

Creating a Project Timesheet Record

Create a Project Timesheet record by navigating to Project Management / Project Timesheet on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Project Timesheet task that has been assigned to you from the Tasks log.

Complete the Project Timesheet form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Project Timesheet**.
3) On the Project Timesheet 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Project Timesheet.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Project Timesheet but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Project Timesheet Form

Key Information

Key Information about this Project Timesheet record.

Field Name	Access	Description
Resource	Required	Defaults to the name of the current signed-in user; however, another authorized user's name can be specified.
Resource ID	Read-Only	The ID of the selected resource
Period Start	Required	Starting Monday for the period of this Project Timesheet

Field Name	Access	Description
Title	Read-Only	Title of the record
Role	Required	The system automatically populates this field with the role associated with the selected resource.
Manager	Read-Only	The system automatically populates this field with the name of the manager associated with the selected resource.
Amount	Read-Only	Amount of this record or line item

Description

This information might appear in any formal printouts of this Project Timesheet.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Hours Details

Breakdown of the hours entered on the Project Hours tab.

Field Name	Access	Description
Monday Date	Read-Only	Monday's date, based on the Period Start
Monday Total Hours	Read-Only	Total Monday Hours, from all tabs
Tuesday Date	Read-Only	Tuesday's date, based on the Period Start
Tuesday Total Hours	Read-Only	Total Tuesday Hours, from all tabs

Field Name	Access	Description
Wednesday Date	Read-Only	Wednesday's date, based on the Period Start
Wednesday Total Hours	Read-Only	Total Wednesday Hours, from all tabs
Thursday Date	Read-Only	Thursday's date, based on the Period Start
Thursday Total Hours	Read-Only	Total Thursday Hours, from all tabs
Friday Date	Read-Only	Friday's date, based on the Period Start
Friday Total Hours	Read-Only	Total Friday Hours, from all tabs
Saturday Date	Read-Only	Saturday's date, based on the Period Start
Saturday Total Hours	Read-Only	Total Saturday Hours, from all tabs
Sunday Date	Read-Only	Sunday's date, based on the Period Start
Sunday Total Hours	Read-Only	Total Sunday Hours, from all tabs
Total Project Hours	Read-Only	Total Project Hours, from the Project Hours tab

Record Information

System information about this record.

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Field Name	Access	Description
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.

Additional Information

The Project Timesheet Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Timesheet Date Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Date Picker UDF 2	Disabled	Reserved for future use by your organization
Timesheet Decimal UDF 1	Disabled	Reserved for future use by your organization
Timesheet Decimal UDF 2	Disabled	Reserved for future use by your organization
Timesheet Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Timesheet Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Timesheet Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Timesheet Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Project Timesheet Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Timesheet Text 255 UDF 1	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 2	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 3	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 4	Disabled	Reserved for future use by your organization
Timesheet Long Text UDF 1	Disabled	Reserved for future use by your organization
Timesheet Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Project Timesheet is different from the base currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Completing the Project Hours tab

General

Field Name	Access	Description
Monday Project Hours	Editable	Total Monday Project Hours, from the Project Hours tab
Tuesday Project Hours	Editable	Total Tuesday Project Hours, from the Project Hours tab
Wednesday Project Hours	Editable	Total Wednesday Project Hours, from the Project Hours tab
Thursday Project Hours	Editable	Total Thursday Project Hours, from the Project Hours tab
Friday Project Hours	Editable	Total Friday Project Hours, from the Project Hours tab
Saturday Project Hours	Editable	Total Saturday Project Hours, from the Project Hours tab
Sunday Project Hours	Editable	Total Sunday Project Hours, from the Project Hours tab
Total Project Hours	Read-Only	Total Project Hours for this line item

Cost Information

Cost information for this Project Timesheet.

Field Name	Access	Description
Role	Required	Role (ID and Name) for this timesheet
Use Overtime Rate	Editable	Select this checkbox to use the overtime rate for the role instead of the standard rate.
Cost Code	Required	Select the correct Timesheet cost code for your organization.
Code Name	Read-Only	Name that corresponds to the selected cost code
Standard Rate	Read-Only	Standard rate for the Role
Overtime Rate	Read-Only	Overtime rate for the Role

Field Name	Access	Description
Amount	Read-Only	Amount of this record or line item
Effective Date	Required	The Effective Date should match the Period Start date from the main form. If you update the Period Start, ensure you also update this date.

Description

Description of the project hours worked.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.

Risk Business Process

Use the Risk business process to record and prioritize all the risks that can occur in a project, and to propose and track the status of potential risks. Score risks using the risk matrix for both pre- and post-response plans.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Impacted	non-terminal status
Managed	non-terminal status
Open	non-terminal status
Proposed	non-terminal status
Rejected	non-terminal status

Related Processes

The Risk business process might create the following business processes: Action Item, Issue

The Risk business process might be created by the following business processes: Request for Information

Creating a Risk Record

Create a Risk record by navigating to Project Management / Risk on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Risk form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Risk**.
3) On the Risk page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Risk Form

Key Information

Key information about this Risk is provided below.

Field Name	Access	Description
Title	Required	Title of the record
Status	Required	Required Risks initially begin with a Proposed status until they are reviewed. Following a review, they can be set to either Open (identified as a valid risk) or Rejected (not a valid risk). After the risk impacts the project, it should be set to Active. From there, it can either become Managed (it was successfully managed by the project team) or Impacted (it impacted the project).
Risk Type	Required	The type of risk for risk process
Risk Priority	Editable	The Risk Priority list from the drop-down list

Field Name	Access	Description
Risk Category	Editable	The Risk Category list from the drop-down list
Contract	Editable	The contract that is a reference to this record
Pre-Response Probability of Occurrence	Editable	The probability of the risk occurring, before mitigation actions are taken
Cost Exposure	Read-Only	Determines cost exposure through multiplying the potential cost amount by the pre-response probability for the risk

Description

This information might appear in any formal printouts of this item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.

Cost & Schedule Information

Estimate the impact this risk will have on the cost and schedule.

Field Name	Access	Description
Cost Impact	Editable	Indicates whether there is a cost impact
Schedule Impact	Editable	Indicates whether there is a schedule impact
Owner Estimate	Editable	If there is a cost impact, this field shows the total amount of the cost impact.
Est. Schedule Impact (Days)	Editable	If the schedule is impacted, this field indicates the number of days that impact the schedule.
Cost Impact Notes	Editable	If there is a cost impact, this field describes the reason.
Schedule Impact Notes	Editable	Description of why the schedule is impacted, if a schedule impact is indicated

Action to Resolve

Enter information about how this Risk will be resolved.

Field Name	Access	Description
Proposed Action to Resolve	Editable	The proposed actions to resolve the risk
Actual Action to Resolve	Editable	The actions that must be taken to resolve the risk
Forecasted Resolution Date	Editable	The date when the issue threat has been eliminated, is no longer present, or is resolved independently
Actual Resolution Date	Editable	Actual date of Issue Resolution
Planned Response Cost	Editable	The risk planned response cost
Actual Response Cost	Editable	The actual cost to respond to the risk
Post-Response Probability of Occurrence	Editable	The probability of the risk occurring, after mitigation actions are taken
Issue Record	Read-Only	Link to the created Issue record, after it is created from a Risk record

Detailed Description

Enter a detailed summary of the cause, description, and effect of this risk.

Field Name	Access	Description
Cause	Editable	The cause or source of the risk
Description	Editable	Description for risk process
Effect	Editable	The effect for risk process

Risk Identification and Management

Information about the identification and management of the Risk

Field Name	Access	Description
Identified By	Editable	The person who has identified the risk

Field Name	Access	Description
Identified Date	Editable	The date the risk was identified
Risk Manager	Editable	The person currently assigned to manage the risk
Exclude from Reporting?	Editable	Used to exclude this record from some project or organizational reports

Risk Exposure Window

Date range to define when the Risk might occur

Field Name	Access	Description
Start Date	Editable	The start date if the risk can only occur as of a specific date (for example, weather events)
Finish Date	Editable	The finish date if the risk can only occur until a specific date (for example, weather events)

Risk Matrix / Risk Scoring

This block can be used to calculate a score for this risk, based on the weightings set for this project.

Field Name	Access	Description
Cost Impact Weighting	Read-Only	The weighting for the cost impact when calculating the risk score
Pre-Response Cost Impact	Editable	The likely cost impact of the risk before response
Post-Response Cost Impact	Editable	The likely cost impact of the risk after response
Schedule Impact Weighting	Read-Only	The weighting for the schedule impact when calculating the risk score
Pre-Response Schedule Impact	Editable	The likely schedule impact of the risk before response
Post-Response Schedule Impact	Editable	The likely schedule impact of the risk after response

Field Name	Access	Description
Scope Impact Weighting	Read-Only	The weighting for the scope impact when calculating the risk score
Pre-Response Scope Impact	Editable	The likely scope impact of the risk before response
Post-Response Scope Impact	Editable	The likely scope impact of the risk after response
Reputation Impact Weighting	Read-Only	The weighting for the reputation impact when calculating the risk score
Pre-Response Reputation Impact	Editable	The likely reputation impact of the risk before response
Post-Response Reputation Impact	Editable	The likely reputation impact of the risk after response
Environmental Impact Weighting	Read-Only	The weighting for the environmental impact when calculating the risk score
Pre-Response Environmental Impact	Editable	The likely environmental impact of the risk before response
Post-Response Environmental Impact	Editable	The likely environmental impact of the risk after response
Pre-Response Risk Score	Read-Only	The pre-response risk score is calculated from the pre-response criteria, based on the weightings specified for the project.
Post-Response Risk Score	Read-Only	The post-response risk score is calculated from the post-response criteria, based on the weightings specified for the project.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number

Field Name	Access	Description
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The Risk Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Risk Date Picker UDF 1	Disabled	Reserved for future use by your organization
Risk Date Picker UDF 2	Disabled	Reserved for future use by your organization
Risk Decimal UDF 1	Disabled	Reserved for future use by your organization
Risk Decimal UDF 2	Disabled	Reserved for future use by your organization
Risk Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Risk Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Risk Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Risk Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Risk Picker UDF 1	Disabled	Reserved for future use by your organization
Risk Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Risk Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Risk Text 255 UDF 1	Disabled	Reserved for future use by your organization
Risk Text 255 UDF 2	Disabled	Reserved for future use by your organization
Risk Text 255 UDF 3	Disabled	Reserved for future use by your organization
Risk Text 255 UDF 4	Disabled	Reserved for future use by your organization
Risk Long Text UDF 1	Disabled	Reserved for future use by your organization
Risk Long Text UDF 2	Disabled	Reserved for future use by your organization

Currency

If the currency of this Risk is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Consolidating Line Items

Risk line items can be consolidated from the following business processes:

- Budget Change
- Budget Transfer
- Change Order
- Change Request
- Contract
- Estimate
- Initial Budget
- Potential Change Order
- Risk

Completing the Detailed Cost Estimate tab

Cost Information

Cost breakdown for this risk. The Potential Cost Impact should be entered as a positive number. When calculating the Cost Exposure, Threats will appear as a positive number and Opportunities will appear as negative.

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code
Potential Cost Impact	Required	The full potential cost impact of the risk line item, not taking probability into account
Cost Exposure	Read-Only	Determines cost exposure through multiplying the potential cost amount by the pre-response probability for the risk.

Description

Description for this Risk line item

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Risk Information

Information from the Risk record. Updates to the Risk should be reflected here as well.

Field Name	Access	Description
Risk Type	Required	The type of risk for risk process
Pre-Response Probability of Occurrence	Required	The probability of the risk occurring, before mitigation actions are taken

Additional Information

Enter additional information specific to this Risk line item.

Field Name	Access	Description
Spend Category	Editable	Select the spending category.
Work Package	Editable	Select the Work Package that this item will roll up to.

Completing the Response Actions tab

Key Information

Key information for this response action

Field Name	Access	Description
Title	Required	Title of the record
Response Action Status	Required	Tracks the status of the response action
Assigned To	Editable	The action item will be assigned to this user for resolution on the next step of the workflow.

Key Dates

Planned and Actual dates for the response action

Field Name	Access	Description
Planned Start	Editable	Planned start date of the response action
Planned Finish	Editable	Planned finish date of the response action
Start	Editable	Start date of the response action
Finish	Editable	Finish date of the response action

Description

Enter a brief description of the response action and provide further details on the detailed description field.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Action Item

Create an Action Item on a given date, assigned to the response action manager above.

Field Name	Access	Description
Create Action Item?	Required	Determines whether an action item should be created for this record or line item
Create Action Item On	Required	Date when the Action Item should be created
Target Completion Date	Editable	The target completion date for the action item. To be updated as needed, particularly when re-assigning an action item.
Action Item Priority	Editable	An integer value representing the priority of the action item
Action Item Record	Editable	Link to the created Action Item record, after it is created

Field Management

Architect's Supplemental Instructions Business Process

Architects use the Architect's Supplemental Instructions (ASI) business process to distribute instructions or design-related changes to the project team.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Acknowledged	terminal status
Canceled	terminal status
Closed	terminal status
Awaiting_Review	non-terminal status
Contractor_Review	non-terminal status

Workflow

The default workflow for the Architect's Supplemental Instructions business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Architect's Supplemental Instruction business process might create the following business processes: Change Request

The Architect's Supplemental Instruction business process might be created by the following business processes: Not applicable

Creating an Architect's Supplemental Instructions Record

Create an Architect's Supplemental Instructions record by navigating to Field Management / Architect's Supplemental Instructions on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Architect's Supplemental Instructions task that has been assigned to you from the Tasks log.

Complete the Architect's Supplemental Instructions form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Architect's Supplemental Instructions**.
3) On the Architect's Supplemental Instructions page, click **Create**. Complete the form. You can click **Save** at any time to save a draft version of the form. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Architect's Supplemental Instructions.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Architect's Supplemental Instructions but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Architect's Supplemental Instructions Form

Key Information

Key information from the organization issuing this ASI

Field Name	Access	Description
Title	Required	Enter a title.
ASI Issuance Date	Editable	Date that the architect issued the ASI
AE Project Number	Editable	Architect's or Engineer's project number
ASI Number	Editable	ASI number from the project architect

Distribution

ASI distribution quantities

Field Name	Access	Description
Architect Copies	Editable	ASI copies to the architect
Owner Copies	Editable	ASI copies to the owner
Field Copies	Editable	ASI copies to the field
Contractor Copies	Editable	ASI copies to the contractor
Consultant Copies	Editable	ASI copies to the consultant
Other Copies	Editable	ASI copies to the other parties

Description

Instructions and drawings that pertain to this ASI. This information might appear in formal printouts of this ASI.

Field Name	Access	Description
Detailed Description	Editable	Detailed information about the short-description field. The field size can be expanded.
Drawings	Editable	A list of drawings related to the project

Architect Information

Details of the Architect for this ASI

Field Name	Access	Description
Legal Vendor Name	Required	Lists the legal vendor name if the vendor name is different from the vendor's full legal business name, the vendor has a name longer than 50 characters, or both.
Full Name	Editable	Full name of the primary contact
Vendor Contact Phone	Required	Phone number of the main vendor contact
Contact Email	Required	Contact email address for the main vendor
Address	Editable	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
State/Province	Editable	State or province
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Editable	Country
Zip/Postal Code	Editable	ZIP Code or postal code

Reference Contract Details

Details about the referenced contract relevant to the ASI

Field Name	Access	Description
Contract	Editable	Contract that is a reference to this record
Vendor Name	Editable	Name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.

Field Name	Access	Description
Effective Date	Editable	The date on which the contract takes effect

Cost & Schedule Information

Information about the potential cost and schedule impact of this ASI

Field Name	Access	Description
Cost Impact	Editable	Indicates whether there is a cost impact
Schedule Impact	Editable	Indicates whether there is a schedule impact
Owner Estimate	Editable	If there is a cost impact, this field shows the total amount of the cost impact.
Est. Schedule Impact (Days)	Editable	If the schedule is impacted, this field indicates the number of days that impact the schedule.
Cost Impact Notes	Editable	If there is a cost impact, this field describes the reason.
Schedule Impact Notes	Editable	Description of why the schedule is impacted, if a schedule impact is indicated.
Create a Change Request?	Editable	If selected, automatically create a change request upon approval of this record.
Change Request Record	Editable	Link to the created Change Request record, after it is created

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow

Field Name	Access	Description
		action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The ASI Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
ASI Date Picker UDF 1	Disabled	Reserved for future use by your organization
ASI Date Picker UDF 2	Disabled	Reserved for future use by your organization
ASI Decimal UDF 1	Disabled	Reserved for future use by your organization
ASI Decimal UDF 2	Disabled	Reserved for future use by your organization
ASI Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
ASI Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
ASI Currency Amount UDF 1	Disabled	Reserved for future use by your organization
ASI Currency Amount UDF 2	Disabled	Reserved for future use by your organization
ASI Picker UDF 1	Disabled	Reserved for future use by your organization
ASI Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The ASI Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
ASI Text 255 UDF 1	Disabled	Reserved for future use by your organization
ASI Text 255 UDF 2	Disabled	Reserved for future use by your organization
ASI Text 255 UDF 3	Disabled	Reserved for future use by your organization
ASI Text 255 UDF 4	Disabled	Reserved for future use by your organization
ASI Long Text UDF 1	Disabled	Reserved for future use by your organization
ASI Long Text UDF 2	Disabled	Reserved for future use by your organization

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Daily Report Business Process

Use the Daily Report business process to catalog activities, progress, site visits, issues, resolutions, and other pertinent information. Often this record is copied from the previous entry and edited to reflect changes since the last entry.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Open	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Daily Report business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Daily Report business process might create the following business processes: Issue

The Daily Report business process might be created by the following business processes: Not applicable

Creating a Daily Report Record

Create a Daily Report record by navigating to Field Management / Daily Report on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Daily Report task that has been assigned to you from the Tasks log.

Complete the Daily Report form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Daily Report**.
3) On the Daily Report 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Daily Report.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Daily Report but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Daily Report Form

Key Information

Key information about this daily report is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Contract	Editable	The contract that is a reference to this record
Superintendent	Editable	The name of the superintendent
Project Manager	Editable	The manager of the project
Contractor	Editable	The name of the main contractor
Daily Activity Date	Editable	The date of the daily report

Work Status

Summary of the work done during the reporting day and anything that affected it

Field Name	Access	Description
Work Performed	Editable	The work completed on the project on the day of the report
Discrepancies	Editable	The differences between planned and actual work
Deficiencies	Editable	Indicate the deficiencies (work not done or done improperly) on the day of the daily report.
Comments	Editable	Comments for the daily report

Workforce

Total number of people/hours that worked the reporting day

Field Name	Access	Description
Total Workforce	Read-Only	The number of people on the workforce on the day of the report
Total Workforce Hours	Read-Only	The total number of the hours that all project personnel worked on the project on the day of the report

Photos

Indicate whether photos have been taken and are attached.

Field Name	Access	Description
Photos Taken	Editable	Indicate whether photos have been taken.
Photos Attached	Editable	Indicate whether photos have been entered into record on the day of the report.

Weather

The weather conditions for the job site (if applicable)

Field Name	Access	Description
Sky Conditions	Editable	The conditions of the on the day of the report
Wind Scale	Editable	The average wind on day of report
Precipitation	Editable	The type of precipitation measured on the day of report
Precipitation Amount (inches)	Editable	The amount of precipitation on the day of the report
Ground Conditions	Editable	The ground conditions at the time of the report
Humidity	Editable	The amount of humidity on the day of the report
Temperature (F)	Editable	The temperature on the day of report
Pressure (Inches of Hg)	Editable	The pressure reading for the day. Might designate a time of day to take reading.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was

Field Name	Access	Description
		created
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Daily Reports Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Daily Reports Date Picker UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Date Picker UDF 2	Disabled	Reserved for future use by your organization
Daily Reports Decimal UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Decimal UDF 2	Disabled	Reserved for future use by your organization
Daily Reports Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Daily Reports Picker UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Daily Reports Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Daily Reports Text 255 UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Text 255 UDF 2	Disabled	Reserved for future use by your organization
Daily Reports Text 255 UDF 3	Disabled	Reserved for future use by your organization
Daily Reports Text 255 UDF 4	Disabled	Reserved for future use by your organization
Daily Reports Long Text UDF 1	Disabled	Reserved for future use by your organization
Daily Reports Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Equipment tab

General

Equipment on site during the reporting period

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Description	Editable	Enter any additional details.
Model	Editable	The equipment model information
Type	Editable	The type of equipment
Units	Editable	The number of units
Area	Editable	The area, from a list of physical areas, related to this project or building
Remarks	Editable	Any additional comments about this vendor
Source	Editable	The source of the equipment
Idle	Editable	Indicates if the equipment is idle.
Rented	Editable	The date the equipment is rented

Field Name	Access	Description
Acquired	Editable	The date the equipment was acquired
Due Back	Editable	The equipment return due date

Completing the Issues tab

Description

A brief description of the issue

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.

Issue

Create issues by entering in the issue details.

Field Name	Access	Description
Create an Issue?	Editable	Allows for automatically creating an issue after closing the record
Title	Editable	The title of the issue
Issue Priority	Editable	The priority of the issue
Issue Severity	Editable	The severity of the issue
Identified By	Editable	The person who has identified the risk
Identified Date	Editable	The date the risk was identified

Delays

Delays that occurred today

Field Name	Access	Description
Reason for Delay	Editable	Reason for any delays today
Hours Delayed	Editable	Hours of delay today

Completing the Materials tab

General

Materials on site during the reporting period

Field Name	Access	Description
Material Name	Required	The name of material used
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Item Quantity	Editable	Enter the item quantity.
Delivery Time	Editable	The time of delivery
Short Description	Required	Enter a description of 250 characters or fewer.
Description	Editable	Enter any additional details.
Remarks	Editable	Any additional comments about this vendor
Area	Editable	The area, from a list of physical areas, related to this project or building
Ticket Number	Editable	The ticket number for a specific requisition
Requisition Date	Editable	The date the material is requested

Completing the Visitors tab

General

Visitors on site during the reporting period

Field Name	Access	Description
Visitor Name	Required	The name of the visitor
Short Description	Required	Enter a description of 250 characters or fewer.
Arrival Time	Editable	The date and time of the visitor's arrival
Departure Time	Editable	The date and time of the visitor's departure
Company Name of Visitor	Editable	The name of the company that the visitor works for
Company Represented	Editable	The name of the company that the visitor represents

Field Name	Access	Description
Remarks	Editable	Any additional comments about this vendor

Completing the Workforce tab

General

General information about the workforce

Field Name	Access	Description
Contractor	Required	The name of the main contractor
Area	Editable	The area, from a list of physical areas, related to this project or building
Work Performed	Editable	The work completed on the project on the day of the report
Remarks	Editable	Any additional comments about this vendor

Employee Count

Number of employees present during the project reporting day and number of hours worked by each group of employees

Field Name	Access	Description
Project Managers	Editable	The number of project managers who worked on the project on the date of the daily report
Project Managers Hours	Editable	The number of hours worked by the project managers
Apprentices	Editable	The number of apprentices who worked on the project on the date of the daily report
Apprentices Hours	Editable	The number of hours worked by the apprentices
Journeymen	Editable	The number of journeymen who worked on the project on the date of the daily

Field Name	Access	Description
		report
Journeymen Hours	Editable	The number of hours worked by the journeymen
Safety Staff	Editable	The number of safety staff that worked on the project on the day of the daily report
Safety Staff Hours	Editable	The number of hours worked by the safety staff
Superintendents	Editable	The number of superintendents who worked on the project on the date of the daily report
Superintendents Hours	Editable	The number of hours worked by the superintendents
Administrative Staff	Editable	The number of administrative staff who worked on the project on the date of the daily report
Administrative Staff Hours	Editable	The number of hours worked by the administrative staff
Other Staff	Editable	The number of other staff who worked on the project on the day of the daily report
Other Staff Hours	Editable	The number of hours worked by the other staff

Field Observation Business Process

Use the Field Observation business process to record observations at a site, including quality, safety, and general observations. This business process is typically used by an architect or engineer.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Field Observation business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Field Observations Record

Create a Field Observation record by navigating to Field Management / Field Observation on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Field Observation task that has been assigned to you from the Tasks log.

Complete the Field Observation form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Field Observation**.
3) On the Field Observation 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **Field Observation**.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Field Observation but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Field Observation Form

Key Information

Key information about these field observations is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Observation Date	Editable	The date of the observation
Observation Type	Editable	The type of the observation being recorded
Target Completion Date	Editable	The targeted completion date for the action item. To be updated as needed, particularly when reassigning the Action Item.
Area	Editable	The specific area for the Incident item
Location/Equipment	Editable	Location or equipment of this observation

Description

Scope description and anything else needed for describing this field observation

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer. This short description might be used in logs, dashboards, and reports.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.
Resolution	Editable	Add additional information about how the noted observation is managed and resolved.

Location

Location of the Field Observation. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map.

Field Name	Access	Description
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Field Observation Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Field Observations Date Picker UDF 1	Disabled	Reserved for future use by your organization
Field Observations Date Picker UDF 2	Disabled	Reserved for future use by your organization
Field Observations Decimal UDF 1	Disabled	Reserved for future use by your organization
Field Observations Decimal UDF 2	Disabled	Reserved for future use by your organization
Field Observations Date Only Picker UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Field Observations Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Field Observations Picker UDF 1	Disabled	Reserved for future use by your organization
Field Observations Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Field Observations Text 255 UDF 1	Disabled	Reserved for future use by your organization
Field Observations Text 255 UDF 2	Disabled	Reserved for future use by your organization
Field Observations Text 255 UDF 3	Disabled	Reserved for future use by your organization
Field Observations Text 255 UDF 4	Disabled	Reserved for future use by your organization
Field Observations Long TEXT UDF 1	Disabled	Reserved for future use by your organization
Field Observations Long TEXT UDF 2	Disabled	Reserved for future use by your organization

Incident Management Business Process

Use the Incident Management business process to capture and store information regarding a safety issue. The Incident Management log stores all incident reports along with their status. You can add additional information to capture material losses, injuries, and witnesses.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Closed	terminal status
Awaiting_Review	non-terminal status
Open	non-terminal status

Revision_Required	non-terminal status

Workflow

The default workflow for the Incident Management business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating an Incident Management Record

Create an Incident Management record by navigating to Field Management / Incident Management on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Incident Management task that has been assigned to you from the Tasks log.

Complete the Incident Management form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Incident Management**.
3) On the Incident Management 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Incident Management.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Incident Management but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Incident Management Form

Key Information

Key information about this incident

Field Name	Access	Description
Title	Required	Enter a title.

Field Name	Access	Description
Incident Date and Time	Editable	Time and date of the incident
Type of Incident	Editable	Type of incident that happened
Subtype of Incident	Editable	Subtype of incident that happened
Area	Editable	Specific area for the Incident item

Description

Description of the incident

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Incident Investigation

Information related to the investigation of the incident

Field Name	Access	Description
Causes of the Incident in Detail	Editable	Detailed description of the causes of the incident
Indicate if any of the Safety Norms were not Followed	Editable	Detailed description of the safety measures that were not followed

Corrective Actions

Summary of corrective actions put into place for avoiding this incident in the future

Field Name	Access	Description
Description of Initial Response Action	Editable	Description of any initial response that was taken
Description of Corrective Measures Implemented	Editable	Description of which corrective measures were implemented to avoid new incidents

Field Name	Access	Description
How Were these Corrective Measures Communicated to the Workers	Editable	Detailed description of how the corrective measures were communicated to the workers

Location

Location of the incident. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map.

Field Name	Access	Description
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Incident Management Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Incident Management Date Picker UDF 1	Disabled	Reserved for future use by your organization
Incident Management Date Picker UDF 2	Disabled	Reserved for future use by your organization
Incident Management Decimal UDF 1	Disabled	Reserved for future use by your organization
Incident Management Decimal UDF 2	Disabled	Reserved for future use by your organization
Incident Management Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Incident Management Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Incident Management Picker UDF 1	Disabled	Reserved for future use by your organization
Incident Management Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Incident Management Text 255 UDF 1	Disabled	Reserved for future use by your organization
Incident Management Text 255 UDF 2	Disabled	Reserved for future use by your organization
Incident Management Text 255 UDF 3	Disabled	Reserved for future use by your organization
Incident Management Text 255 UDF 4	Disabled	Reserved for future use by your organization
Incident Management Long Text UDF 1	Disabled	Reserved for future use by your organization
Incident Management Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Material Losses tab

Material Losses

Description of the type of loss as consequence of the accident

Field Name	Access	Description
Type of Loss	Required	Indicates the material loss incurred as a result of the incident.
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Completing the People Injured tab

Person Identification

Details about the person injured are displayed here.

Field Name	Access	Description
Contractor	Editable	Name of the main contractor
Employee First Name	Editable	First name of the employee
Employee Last Name	Editable	Last name of the employee

Incident

Details about the incident are displayed here.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.
Injury Type	Editable	Type of the injury
Physician's Name	Editable	Name of the physician
Case Classification	Editable	In cases of impact to people, specify the case classification or the severity of the incident.
Days Away from Work	Editable	Number of days absent from work due to the incident

Field Name	Access	Description
Date of Death	Editable	In case of fatality, introduce the date of the death.

Hospitalization

Details about the hospitalization are displayed here.

Field Name	Access	Description
Hospital Name	Editable	Enter the name of the hospital where the person who suffered the accident has been hospitalized.
Address	Editable	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
State/Province	Editable	State or province
Number of Days in Hospital	Editable	Number of days the injured person spent in the hospital.

Completing the Witness Information tab

Witness Contact

Contact details of the witnesses of the incident

Field Name	Access	Description
Witness First Name	Editable	First name of the person who witnessed the accident
Witness Last Name	Editable	Last name of the person who witnessed the accident
Company	Editable	Company of the person who witnessed the accident
Address	Editable	Street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
Mobile Phone	Editable	Mobile phone number of the person who witnessed the

Field Name	Access	Description
		accident
Work Phone	Editable	Work phone number of the person who witnessed the accident
Home Phone	Editable	Home phone number of the person who witnessed the accident
E-Mail	Editable	Email of the person who witnessed the accident
Short Description	Required	Short description of the incident

Notes

Additional details about the witness

Field Name	Access	Description
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Request for Information Business Process

Use the Request for Information (RFI) business process to submit your questions and proposed solutions, and to enter key information with request for clarification for review and approval.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Open	non-terminal status

Workflow

The default workflow for the Request for Information business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Request for Information business process might create the following business processes: Change Request, Issue, Risk

The Request for Information business process might be created by the following business processes: Not applicable

Creating a Request for Information Record

Create a Request for Information record by navigating to Field Management / Request for Information on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Request for Information task that has been assigned to you from the Tasks log.

Complete the Request for Information form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Request for Information**.
3) On the Request for Information 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Request for Information.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Request for Information but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Request for Information Form

Key Information

Key information about this RFI is provided in this section.

Field Name	Access	Description
Title	Required	Enter a title.
Response Requested By	Editable	The response request date, for the Architect or Engineer, in the Request for Information (RFI) record.
RFI Reason	Required	Indicates the that reason the RFI is submitted
RFI Type	Required	RFI type (commonly designated either as Design or Construction)
RFI Priority	Required	RFI priority from Low to Urgent

RFI Information

Track the associated Contract, Primary Discipline, Reference Contract Documents, Area, or Spec Section in this section.

Field Name	Access	Description
Contract	Editable	The contract that is a reference to this record
Reference Document	Editable	The documents, drawings, images, and other files submitted for the Request for Information (RFI) record
Discipline	Editable	Select the Discipline specific to this document.
Spec Section	Editable	Specification section
Area	Editable	The area, from a list of physical areas, related to this project or building

RFI Question and Proposed Solution

The question and optionally a proposed solution

Field Name	Access	Description
Question	Required	Clarification request or clarification question
Proposed Solution	Editable	The proposed solution for

Field Name	Access	Description
		review

Proposed Cost & Schedule Information

Details about the contractor's proposed cost and schedule impact of this RFI

Field Name	Access	Description
Proposed Contractor Estimate	Editable	The Proposed Estimate by the contractor
Proposed Est. Schedule Impact (Days)	Editable	The proposed schedule impact in days, entered by the contractor
Proposed Cost Impact Notes	Editable	If cost is impacted, describe the reason.
Proposed Schedule Impact Notes	Editable	If schedule is impacted, describe the reason.

Cost & Schedule Information

The owner enters the cost and schedule impact of this RFI.

Field Name	Access	Description
Cost Impact	Required	Indicates whether there is a cost impact
Schedule Impact	Required	Indicates whether there is a schedule impact
Owner Cost Estimate	Editable	If there is a cost impact, the owner enters the total amount of the impact.
Owner Schedule Impact Estimate (Days)	Editable	If there is a schedule impact, the owner enters the total number of days that impact the schedule.
Cost Impact Notes	Editable	If there is a cost impact, enter the reason.
Schedule Impact Notes	Editable	If there is a schedule impact, enter the reason.

Reference Processes

Processes created and referenced from this RFI. The Detailed Description is used to auto-populate the created Change Request, Potential Change Order, Risk, or Issue.

Field Name	Access	Description
Create a Change Request?	Editable	If selected, the system automatically creates a Change Request record after the RFI is approved.
Change Request Record	Read-Only	Link to the created Change Request record, after it is created from the RFI record.
Create a Potential Change Order?	Editable	If selected, the system automatically creates a Potential Change Order record after the RFI is closed.
Potential Change Order Record	Read-Only	Link to the created Potential Change Order record, after it is created from the RFI record.
Create a Risk?	Editable	If selected, the system automatically creates a Risk record after the RFI is closed.
Risk Record	Read-Only	Link to the created Risk record, after it is created from the RFI record.
Create an Issue?	Editable	If selected, the system automatically creates an Issue record after the RFI is closed.
Issue Record	Read-Only	Link to the created Issue record, after it is created from the RFI record.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Location

Location of the Request for Information. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map.

Field Name	Access	Description
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Related Activity/Milestone

Schedule information of the selected activity/milestone

Field Name	Access	Description
Activity/Milestone	Editable	Select the activity or milestone that should be used to track the planned and actual dates in this record.
Activity Name	Read-Only	The name of the selected activity/milestone from Project Schedule
Planned Start	Read-Only	The planned start date from the selected

Field Name	Access	Description
		activity/milestone
Planned Finish	Read-Only	The planned finish date from the selected activity/milestone
Actual Start	Read-Only	The actual start date for the project from the schedule activity/milestone
Actual Finish	Read-Only	The actual finish date from the selected activity/milestone

Additional Information

The RFI Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
RFI Date Picker UDF 1	Disabled	Reserved for future use by your organization
RFI Date Picker UDF 2	Disabled	Reserved for future use by your organization
RFI Decimal UDF 1	Disabled	Reserved for future use by your organization
RFI Decimal UDF 2	Disabled	Reserved for future use by your organization
RFI Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
RFI Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
RFI Currency Amount UDF 1	Disabled	Reserved for future use by your organization
RFI Currency Amount UDF 2	Disabled	Reserved for future use by your organization
RFI Picker UDF 1	Disabled	Reserved for future use by your organization
RFI Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The RFI Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
RFI Text 255 UDF 1	Disabled	Reserved for future use by your organization
RFI Text 255 UDF 2	Disabled	Reserved for future use by your organization
RFI Text 255 UDF 3	Disabled	Reserved for future use by your organization
RFI Text 255 UDF 4	Disabled	Reserved for future use by your organization
RFI Long Text UDF 1	Disabled	Reserved for future use by your organization
RFI Long Text UDF 2	Disabled	Reserved for future use by your organization

Site Photo Business Process

Use the Site Photo business process to add photos, videos or audio files to the Project Document Manager for a project. This BP is optimized for use with the Unifier Mobile Application.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status

Workflow

The default workflow for the Site Photo business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Site Photo business process might create the following business processes: Not applicable

The Site Photo business process might be created by the following business processes: Not applicable

Creating a Site Photo Record

Create a Site Photo record by navigating to Field Management / Site Photo on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Site Photo task that has been assigned to you from the Tasks log.

Complete the Site Photo form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Field Management**, and then select **Site Photo**.
3) On the Site Photo 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **Site Photo**.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Site Photo but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Site Photo Form

Key Information

Key information about this Site Photo record

Field Name	Access	Description
Title	Required	Enter a title.
Publish Date	Required	Enter a date, which is used to specify the folder where the attached files will be stored in the Document Manager.
Photo Taken By	Required	Enter the name of the person who took the

Field Name	Access	Description
		attached photo or photos.
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Area	Editable	The area, from a list of physical areas, related to this project or building
Spec Section	Editable	Specification section

Description

Description of the attached files

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.

Document Properties

Document properties that will transfer to the Document Properties in the Document Manager for the Project

Field Name	Access	Description
System Document Type	Editable	Default System Document Types
Custom Document Type	Editable	Custom Document Types
Discipline	Editable	Select the Discipline specific to this document.
Document Status	Editable	Document Status
Discrete Area Name	Editable	The specific Area to be referenced
Vendor	Editable	Select the vendor for this record.
Comments	Editable	Enter comments about the document.

Location

Location of the Site Photo. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map. Individual attachments created in the mobile app will contain geospatial information.

Field Name	Access	Description
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number
Publish Path	Read-Only	The location of the folder in Document Manager that includes the attached photos

Additional Information

The Site Photo Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Site Photo Date Picker UDF 1	Disabled	Reserved for future use by your organization
Site Photo Date Picker UDF	Disabled	Reserved for future use by

Field Name	Access	Description
2		your organization
Site Photo Decimal UDF 1	Disabled	Reserved for future use by your organization
Site Photo Decimal UDF 2	Disabled	Reserved for future use by your organization
Site Photo Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Site Photo Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Site Photo Picker UDF 1	Disabled	Reserved for future use by your organization
Site Photo Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Site Photo Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Site Photo Text 255 UDF 1	Disabled	Reserved for future use by your organization
Site Photo Text 255 UDF 2	Disabled	Reserved for future use by your organization
Site Photo Text 255 UDF 3	Disabled	Reserved for future use by your organization
Site Photo Text 255 UDF 4	Disabled	Reserved for future use by your organization
Site Photo Long Text UDF 1	Disabled	Reserved for future use by your organization
Site Photo Long Text UDF 2	Disabled	Reserved for future use by your organization

Project Closeout

Lessons Learned Business Process

Use the Lessons Learned business process to capture lessons that were learned throughout the project. This might include citing repeatable issues that can be avoided in the future, documenting best practices that can be leveraged on other projects, and highlighting topics for future reference or posterity.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Acknowledged	non-terminal status
Canceled	non-terminal status
New	non-terminal status

Creating a Lessons Learned Record

Create a Lessons Learned record by navigating to Project Closeout / Lessons Learned on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Lessons Learned form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Closeout**, and then select **Lessons Learned**.
3) On the Lessons Learned page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Lessons Learned Form

Key Information

Field Name	Access	Description
Title	Required	Enter a title.
Lessons Learned Category	Required	The category of lessons learned
Status	Required	This field displays the

Field Name	Access	Description
		record status.

Details

Enter specific information concerning the Lessons Learned including any Recommendations.

Field Name	Access	Description
Challenges	Editable	Description of lessons learned from challenges
Impact	Editable	Description of challenges impact
Successes	Editable	Description of successes
Recommendations	Editable	Recommendations for lessons learned

Description

This information might appear in any formal printouts of this item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Estimated Impacts

Estimate the potential schedule and cost savings across projects by implementing changes based on what was learned.

Field Name	Access	Description
Estimated Days to Implement	Editable	Indicate how many days the change might take to implement.
Estimated Cost to Implement	Editable	Indicate how much the change might cost to implement.
Estimated Number of Projects	Editable	Specify the number of projects on which the change might be implemented.

Field Name	Access	Description
Potential Schedule Savings (days)	Editable	Indicate how many days might be saved.
Potential Cost Savings	Editable	Indicate how much the cost might be reduced by.
Potential Total Cost Savings	Read-Only	Displays projected calculation of cost savings based on the reduced time and cost of implementation.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Additional Information

The Lessons Learned Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Lessons Learned Date Picker UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Date Picker UDF 2	Disabled	Reserved for future use by your organization
Lessons Learned Decimal UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Decimal UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Lessons Learned Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Lessons Learned Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Lessons Learned Picker UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Lessons Learned Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Lessons Learned Text 255 UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Text 255 UDF 2	Disabled	Reserved for future use by your organization
Lessons Learned Text 255 UDF 3	Disabled	Reserved for future use by your organization
Lessons Learned Text 255 UDF 4	Disabled	Reserved for future use by your organization
Lessons Learned Long Text UDF 1	Disabled	Reserved for future use by your organization
Lessons Learned Long Text UDF 2	Disabled	Reserved for future use by your organization

Owner Walk Through Business Process

Use the Owner Walk Through business process to perform site or system walks and record issues. The resulting items automatically create Punch List Items business process records.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Pending	non-terminal status
Punch_Items_Created	non-terminal status

Workflow

The default workflow for the Owner Walk Through business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Owner Walk Through business process might create the following business processes: Punch List Item

The Owner Walk Through business process might be created by the following business processes: Not applicable

Creating an Owner Walk Through Record

Create an Owner Walk Through record by navigating to Project Closeout / Owner Walk Through on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Owner Walk Through task that has been assigned to you from the Tasks log.

Complete the Owner Walk Through form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Closeout**, and then select **Owner Walk Through**.
3) On the Owner Walk Through 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Owner Walk Through.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Owner Walk Through but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.

7) Click **Send.**
8) In the **Notification** window, review the content and click **OK**.
   The record moves to the next step in the workflow.

Completing the Owner Walk Through Form

Key Information

Key Details related to this Owner Walk Through

Field Name	Access	Description
Title	Required	Enter a title.
Purpose	Editable	The purpose for the Punch List or inspection
Line Item Count	Read-Only	The number of line items
Status	Read-Only	This field displays the status of the record.

Punch List Items Defaults

Set default values for any Punch List Items that are found.

Field Name	Access	Description
Priority	Required	Priority of the punch list item
Assigned To	Required	User assigned to the Punch List line items
Punch List Due Date	Required	The date the item is due

Description

Enter the description of this Owner Walk Through. This information might appear in any formal printouts.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Completing the Inspiration Items List tab

Item Details

Key information describing the Punch List Item

Field Name	Access	Description
Standard Issues	Editable	The list of common issues
Punch List Due Date	Required	The date the item is due
Master Section	Editable	Indicates the category of the defect (main section)
Priority	Required	Priority of the punch list item
Type	Editable	The item-type for the Punch List line item
Area	Editable	The area, from a list of physical areas, related to this project or building
Contract	Editable	The contract that is a reference to this record

Description

Detailed description of this Punch List Item

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Image

Quickly add an image to this Punch List Item. If you must add additional images, videos, or other supporting documents, attach them to this line item. Image markup can also be done on the attachments.

Field Name	Access	Description
Issue Thumbnail	Editable	Thumbnail showing the issue. If you must include a high-resolution image (or multiple images, videos, and so on), use the Attachment feature.

Participants

Creator, Assignee, and Reviewer for the Punch List Item

Field Name	Access	Description
Assigned To	Required	User assigned to the Punch List line items
Company	Editable	The company of the user assigned to the Punch List line items
Punch List Item Creator	Read-Only	Name of the person who initiated this Punch List Item
Punch List Item Reviewer	Required	Name of the person who will review this Punch List Item after it is resolved or if it is disputed

Resolution

Field Name	Access	Description
Brief Summary of Actions Taken	Editable	Brief description of the actions taken

Linked Punch List Item

After the Punch List Item is created for this line item, you can see key information here.

Field Name	Access	Description
Linked Punch List Item	Read-Only	The link to the Punch List record
Record Number	Read-Only	The number assigned to the related punch list item
Notified Date	Read-Only	The date the assignee was notified about the item
Resolved Date	Editable	The date the item was resolved
Closed Date	Editable	The date the item was closed

Additional Information

The Punch List Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Punch List Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Punch List Decimal UDF 1	Disabled	Reserved for future use by your organization
Punch List Decimal UDF 2	Disabled	Reserved for future use by your organization
Punch List Date and Time Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Date and Time Picker UDF 2	Disabled	Reserved for future use by your organization
Punch List Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Punch List Currency Amount UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Punch List Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Punch List Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Punch List Text 255 UDF 1	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 2	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 3	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 4	Disabled	Reserved for future use by your organization
Punch List Long Text UDF 1	Disabled	Reserved for future use by your organization
Punch List Long Text UDF 2	Disabled	Reserved for future use by your organization

Punch List Item Business Process

Use the Punch List Item business process to track the list of punch list items identified for the project. Items can be either directly entered or created via the Owner Walk Through.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
Contractor_Review	non-terminal status
Disputed	non-terminal status
Open	non-terminal status
Owner_Review	non-terminal status

Workflow

The default workflow for the Punch List Item business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Punch List Item business process might create the following business processes: Not applicable

The Punch List Item business process might be created by the following business processes: Owner Walk Through

Creating a Punch List Item Record

Create a Punch List Item record by navigating to Project Closeout / Punch List Item on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Punch List Item task that has been assigned to you from the Tasks log.

Complete the Punch List Item form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Project Closeout**, and then select **Punch List Item**.
3) On the Punch List item 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Punch List Item.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Punch List Item but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Punch List Item Form

Key Information

Key information about this Punch List Item

Field Name	Access	Description
Standard Issues	Editable	The list of common issues.
Master Section	Editable	Indicates the category of the defect (main section).
Title	Required	Enter a title.
Priority	Editable	Priority of the punch list item
Type	Editable	The item-type for the Punch List line item.
Area	Editable	The area, from a list of physical areas, related to this project or building.
Contract	Editable	The contract that is a reference to this record.
Assigned To	Required	User assigned to the Punch List line items.
Company	Read-Only	This field displays the company of the user assigned to the Punch List line items.
Punch List Item Creator	Required	Name of the person who initiated this Punch List Item
Punch List Item Reviewer	Required	Name of the person who will review this Punch List Item after it is resolved or if it is disputed

Problem

Information about the issue identified by this item

Field Name	Access	Description
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.
Issue Thumbnail	Editable	Thumbnail showing the issue. If you must include a high-resolution image (or multiple images, videos, and so on), use the Attachment feature.

Key Dates

Key date information for this Punch List Item

Field Name	Access	Description
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Resolution

Details on how the issue has been resolved

Field Name	Access	Description
Brief Summary of Actions Taken	Editable	Brief description of the actions taken
Resolution Thumbnail	Editable	Thumbnail showing the resolved issue. If you must include a high-resolution image (or multiple images, videos, and so on), use the Attachment feature.

Location

Location of the Punch List Item. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map.

Field Name	Access	Description
Tier 1 - Area Group Reference	Read-Only	Tier 1 of the area location
Tier 2 - Area Group Reference	Read-Only	Tier 2 of the area location
Tier 3 - Area Group Reference	Read-Only	Tier 3 of the area location
Tier 4 - Area Group Reference	Read-Only	Tier 4 of the area location
Tier 5 - Area Group Reference	Read-Only	Tier 5 of the area location
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project

Additional Information

The Punch List Item Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Punch List Date and Time Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Date and Time Picker UDF 2	Disabled	Reserved for future use by your organization
Punch List Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Punch List Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Punch List Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Punch List Decimal UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Punch List Decimal UDF 2	Disabled	Reserved for future use by your organization
Punch List Picker UDF 1	Disabled	Reserved for future use by your organization
Punch List Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Punch List Item Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Punch List Text 255 UDF 1	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 2	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 3	Disabled	Reserved for future use by your organization
Punch List Text 255 UDF 4	Disabled	Reserved for future use by your organization
Punch List Long Text UDF 1	Disabled	Reserved for future use by your organization
Punch List Long Text UDF 2	Disabled	Reserved for future use by your organization

Project Closeout Checklist Business Process

Use the Project Closeout Checklist business process to track a checklist of items that must be completed before the project can be closed out. Each checklist item tracks information such as the status, target completion date, and responsible party.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Open	non-terminal status
Closed	non-terminal status

Creating a Project Closeout Record

Create a Project Closeout Checklist record by navigating to Project Closeout / Project Closeout Checklist on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Project Closeout Checklist form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Closeout**, and then select **Project Closeout Checklist**.
3) On the Project Closeout Checklist page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Project Closeout Checklist Form

Key Information

Key information about this record

Field Name	Access	Description
Title	Required	Title of the record
Status	Required	Status of the record
Completed Items	Read-Only	The number of completed items within this checklist
Total Items	Read-Only	The total number of items within this checklist

Details

Enter the description of this Project Closeout Checklist. This information might appear in any formal printouts of this item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer. This description might be used in logs, dashboards, and reports.
Detailed Description	Editable	The detailed information about the short-description

Field Name	Access	Description
		field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Additional Information

The Project Closeout Checklist Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Project Closeout Checklist Date Picker UDF 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Date Picker UDF 2	Disabled	Reserved for future use by your organization
Project Closeout Checklist Decimal UDF 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Decimal UDF 2	Disabled	Reserved for future use by your organization
Project Closeout Checklist Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Project Closeout Checklist Picker UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Project Closeout Checklist Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Project Closeout Checklist Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Project Closeout Checklist Text 255 UDF 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Text 255 UDF 2	Disabled	Reserved for future use by your organization
Project Closeout Checklist Text 255 UDF 3	Disabled	Reserved for future use by your organization
Project Closeout Checklist Text 255 UDF 4	Disabled	Reserved for future use by your organization
Project Closeout Checklist Long Text UDF 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Long Text UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Project Closeout Checklist line items can be consolidated from the following business processes: Project Closeout Checklist

Completing the Checklist Items tab

Description

Description of this item

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Details

Responsible party and target date

Field Name	Access	Description
Responsible	Editable	The individual who is responsible for this closeout item
Responsible Company	Editable	The name of the company responsible for this closeout item
Target Date	Editable	Project Closeout Target Date at the line item detail

Checklist Item Status

Status of the current item

Field Name	Access	Description
Completed	Editable	When marked, checklist item is complete
Checklist Date Completed	Editable	The date the item was completed

Grouping and Numbering

Used to group and order the checklist items

Field Name	Access	Description
Checklist Item Group	Editable	Use this field to categorize Project Closeout Checklist items so grouping can be used for views and reporting purposes.
Checklist Item Number	Editable	Use this field to order Project Closeout Checklist items for views and reporting purposes.

Additional Information

Additional Information specific to this Closeout Checklist line item

Field Name	Access	Description
Project Closeout Checklist Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
Project Closeout Checklist	Disabled	Reserved for future use by

Field Name	Access	Description
Line Item UDF CA 1		your organization
Project Closeout Checklist Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Warranty Business Process

Use the Warranty business process to track warranties against work completed and assets that were installed as part of a project.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Awaiting_Start	non-terminal status
Expired	non-terminal status
Renewed	non-terminal status
Warranty_Terminated	non-terminal status

Related Processes

The Warranty business process might create the following business processes: Action Item

The Warranty business process might be created by the following business processes: Not applicable

Creating a Warranty Record

Create a Warranty record by navigating to Project Closeout / Warranty on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Warranty form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Project Closeout**, and then select **Warranty**.
3) On the Warranty page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.

4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Warranty Form

Key Information

Key Information about this Warranty record

Field Name	Access	Description
Title	Required	Title of the record
Status	Required	Status of the record
Contract	Editable	The contract that is a reference to this record
PO Number	Editable	The Purchase Order number in the Journal Entry
Vendor	Editable	Select the vendor for this record.
Warranty Provider Name	Required	The name or nickname for this Warranty Provider
Warranty Provider Type	Editable	Information about who is providing the warranty. Multiple warranties can be provided against the same asset by different Warranty Providers.
Warranty Provider Number	Editable	Warranty Number supplied by Provider

Warranty Details

Details about this Warranty record

Field Name	Access	Description
Warranty Start Date	Editable	Warranty Starting Date
Warranty Duration Period	Editable	Warranty Duration Period
Warranty Expiration Date	Required	Warranty Expiration Date
Possibility of Renewal?	Editable	Possibility of Renewal?
Warranty Cost	Editable	Amount paid for warranty
Warranty Documentation Attached?	Editable	Is the warranty documentation attached to this record? If not, provide a

Field Name	Access	Description
		reason.
Warranty Required Conditions	Editable	Warranty Required Conditions
Reason for not attaching warranty documentation	Editable	If not attaching the documentation, explain why.

Asset Information

Details about the asset covered by this Warranty record

Field Name	Access	Description
Equipment Name	Editable	Name of the equipment (this might relate to your asset management system)
Equipment Number	Editable	Number of the equipment (this might relate to your asset management system)
Serial Number	Editable	Serial Number of the equipment
Equipment Model	Editable	Model Number or Name
Product Family	Editable	Product Family, if applicable
Equipment Description	Editable	Description of the equipment
Installation Date	Editable	Date the equipment was installed
In Service Date	Editable	Date the equipment was put into service

Warranty Coverage

Information about the coverage for this Warranty record

Field Name	Access	Description
Detailed Description	Editable	Enter detailed information about the Warranty. The field size can be expanded.

Warranty Provider Contact Information

Primary contact information of the warranty provider. Additional contacts can be listed on the Key Contacts tab.

Field Name	Access	Description
Phone	Editable	Phone number
Email	Editable	Email address
Address	Editable	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
Country	Editable	Country
State/Province	Editable	The state or province
Zip/Postal Code	Editable	ZIP Code or postal code
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.

Location

Location of the Punch List Item. This can be completed by selecting an Area, by adding your current location (on mobile), or by choosing an area on a map.

Field Name	Access	Description
Area	Editable	The area, from a list of physical areas, related to this project or building
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area
Tier 1 - Area Group Reference	Read-Only	Tier 1 of the area location
Tier 2 - Area Group Reference	Read-Only	Tier 2 of the area location
Tier 3 - Area Group Reference	Read-Only	Tier 3 of the area location
Tier 4 - Area Group Reference	Read-Only	Tier 4 of the area location
Tier 5 - Area Group Reference	Read-Only	Tier 5 of the area location

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project
Building Code	Read-Only	Short ID or code for the building, structure, facility, and so on
Building Name	Read-Only	Official name of the building, structure, facility, and so on
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Additional Information

The Warranty Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Warranty Date Picker UDF 1	Disabled	Reserved for future use by your organization
Warranty Date Picker UDF 2	Disabled	Reserved for future use by your organization
Warranty Decimal UDF 1	Disabled	Reserved for future use by your organization
Warranty Decimal UDF 2	Disabled	Reserved for future use by your organization
Warranty Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Warranty Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Warranty Currency Amount	Disabled	Reserved for future use by

Field Name	Access	Description
UDF 1		your organization
Warranty Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Warranty Picker UDF 1	Disabled	Reserved for future use by your organization
Warranty Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Warranty Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Warranty Text 255 UDF 1	Disabled	Reserved for future use by your organization
Warranty Text 255 UDF 2	Disabled	Reserved for future use by your organization
Warranty Text 255 UDF 3	Disabled	Reserved for future use by your organization
Warranty Text 255 UDF 4	Disabled	Reserved for future use by your organization
Warranty Long Text UDF 1	Disabled	Reserved for future use by your organization
Warranty Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Key Contacts tab

Key Information

Field Name	Access	Description
Vendor Contact First Name	Required	First name of the main vendor contact
Vendor Contact Last Name	Required	Last name of the main vendor contact
Contact Type	Editable	Type of warranty contact
Line Item Status	Editable	Select the applicable status, **Active** or **Inactive**. **Active** is selected by default.

Contact Information

Field Name	Access	Description
Title	Editable	
Email	Editable	Email address
Work Phone	Editable	
Mobile Phone	Editable	
Home Phone	Editable	

Address

Field Name	Access	Description
Address	Editable	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
Country	Editable	Country
State/Province	Editable	The state or province
Zip/Postal Code	Editable	ZIP Code or postal code
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.

Notes

Field Name	Access	Description
Notes	Editable	Any additional notes

Completing the Reminders tab

General

Field Name	Access	Description
Title	Required	Title of the record
Assigned To	Required	The Action Item will be assigned to this user for resolution on the next step

Field Name	Access	Description
		of the workflow.
Create Action Item On	Required	Date when the Action Item should be created
Target Completion Date	Editable	The targeted completion date for the action item. To be updated as needed, particularly when reassigning the Action Item.
Action Item Priority	Editable	An integer value representing the priority of the Action Item
Action Item Record	Editable	Link to the created Action Item record, after it is created

Description

Enter a brief description of the Action Item and provide additional details on the Detailed Description field.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Document Manager and Submittals

Document Approval Business Process

Use the Document Approval business process to track general documents and files that can be uploaded directly to a project with or without approval.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status

Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Document Approval business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Alternatively, your organization can enable the option to use a five-level serial-approval process, **Serial Approval (5 Level)**. This workflow lets you select approvers for up to five approval steps. You can also designate one or two alternate approvers for each step. If you are a member of the Project Administrators, Project Managers, or Project Coordinators group, you can create a record from the Tasks log or from the Document Approval log. The completion policy for approval steps is set to single, which means that any of the designated approvers at a specific step can move the record to the next step in the workflow.

> **Note:** By default, the **Serial Approval (5 Level)** workflow is set to **Inactive** in the **ORACLE PROJECT TEMPLATE**.

Creating a Document Approval Record

Create a Document Approval record by navigating to Document Manager & Submittals / Document Approval on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Document Approval task that has been assigned to you from the Tasks log.

Complete the Document Approval form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager & Submittals**, and then select **Document Approval**.
3) On the Document Approval page, click **Create**. By default, the **Ball in Court** active workflow is chosen. Refer to the tables below to complete the form. You can click **Save** at any time to save a draft version of the form. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.

5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Document Approval.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Document Approval but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Document Approval Form

Key Information

Key information about this form

Field Name	Access	Description
Title	Required	Enter a title.
Status	Read-Only	This field displays the record status.
System Document Type	Required	Default System Document Types
Discipline	Editable	Select the Discipline specific to this document

Description

Enter the description for this Document. This information might appear in any formal printouts of this item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer. This short description might be used in logs, dashboards, and reports.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Serial Workflow Approvers

If your organization has enabled the Serial Workflow approval process, complete the following section. You can select up to five approvers and you can designate up to two alternates for each step.

Field Name	Access	Description
Approval Step 1 – Approver	Required	Select the first person required to approve the attached documents.
Approval Step 1 – Alternate Approver 1	Editable	Select the first alternate allowed to approve the attached documents.
Approval Step 1 – Alternate Approver 2	Editable	Select the second alternate allowed to approve the attached documents.
Approval Step 2 – Approver	Editable	Select the second person allowed to approve the attached documents.
Approval Step 2 – Alternate Approver 1	Editable	Select the first alternate allowed to approve the attached documents.
Approval Step 2 – Alternate Approver 2	Editable	Select the second alternate allowed to approve the attached documents.
Approval Step 3 – Approver	Editable	Select the third person allowed to approve the attached documents.
Approval Step 3 – Alternate Approver 1	Editable	Select the first alternate allowed to approve the attached documents.
Approval Step 3 – Alternate Approver 2	Editable	Select the second alternate allowed to approve the attached documents.
Approval Step 4 – Approver	Editable	Select the fourth person allowed to approve the attached documents.
Approval Step 4 – Alternate Approver 1	Editable	Select the first alternate allowed to approve the attached documents.
Approval Step 4 – Alternate Approver 2	Editable	Select the second alternate allowed to approve the attached documents.
Approval Step 5 – Approver	Editable	Select the fifth person allowed to approve the attached documents.

Field Name	Access	Description
Approval Step 5 – Alternate Approver 1	Editable	Select the first alternate allowed to approve the attached documents.
Approval Step 5 – Alternate Approver 2	Editable	Select the second alternate allowed to approve the attached documents.

Additional Information

The Document Approval Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Document Approval Date Picker UDF 1	Disabled	Reserved for future use by your organization
Document Approval Date Picker UDF 2	Disabled	Reserved for future use by your organization
Document Approval Decimal UDF 1	Disabled	Reserved for future use by your organization
Document Approval Decimal UDF 2	Disabled	Reserved for future use by your organization
Document Approval Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Document Approval Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Document Approval Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Document Approval Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Document Approval Picker UDF 1	Disabled	Reserved for future use by your organization
Document Approval Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Document Approval Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Document Approval Text 255 UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Document Approval Text 255 UDF 2	Disabled	Reserved for future use by your organization
Document Approval Text 255 UDF 3	Disabled	Reserved for future use by your organization
Document Approval Text 255 UDF 4	Disabled	Reserved for future use by your organization
Document Approval Long Text UDF 1	Disabled	Reserved for future use by your organization
Document Approval Long Text UDF 2	Disabled	Reserved for future use by your organization

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

Completing the Bluebeam Markups tab

Markup Properties

Summary of the key information for this Bluebeam markup

Field Name	Access	Description
Subject	Read-Only	Type of markup from Bluebeam
Author	Read-Only	Person who created the

Field Name	Access	Description
		markup in Bluebeam
Page	Read-Only	Page on which the markup or measurement resides
Status	Read-Only	Status of the markup from Bluebeam
Creation Date	Read-Only	Date and time the markup was created
Last Modified Date	Read-Only	Date and time the markup was last modified

Comment

Comment from Bluebeam

Field Name	Access	Description
Comment	Read-Only	Comment from Bluebeam

Session Information

Information about the Bluebeam session

Field Name	Access	Description
File Name	Read-Only	This field displays the file name.
Session Name	Read-Only	This field displays the session name.
Session ID	Read-Only	This field displays the session ID.
File Revision Number	Read-Only	This field displays file revision number.
File Pub. Number	Read-Only	This field displays the file publish number.

Additional Information

Additional information from Bluebeam

Field Name	Access	Description
Bluebeam UDF 1	Read-Only	Reserved for future use by your organization
Bluebeam UDF 2	Read-Only	Reserved for future use by your organization

Completing the Documents tab

Folder Details

Field Name	Access	Description
Name	Editable	Enter a name.
Folder Path	Read-Only	Displays the path to the selected folder.

Line Item Details

Field Name	Access	Description
Name	Required	Enter a file name or attach a file from your local system or from the Document Manager.
Attach Files	Editable	Select a file from your local system or from the Document Manager.
Title	Editable	Enter the name of the file.
Description	Editable	Enter a description of the file.
Issue Date	Editable	Enter the issue date.
Drawing Set Name	Editable	Enter the name for the package or group of files.
Drawing Number	Editable	Enter the corresponding drawing number for the drawing document as it appears in the drawing document title block.
Revision No.	Editable	Enter a revision number.
Drawing Revision No.	Editable	Enter the revision number for the drawing document as it appears in the drawing document title block.
Drawing Revision Date	Editable	Enter the revision date for the drawing document as it appears in the drawing document title block.
Drawing Notes	Editable	Enter any applicable notes.

Field Name	Access	Description
Discipline	Editable	From the list, select the Discipline that applies to this drawing.
Line Item Status	Editable	From the list, select the applicable status for this drawing. **In Review** is selected by default.

Submittal Business Process

Use the Submittal business process to track items, such as documents or deliverables, that are produced by a general contractor (GC), supplier, or subcontractor and delivered to an owner for use in a project.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Closed	terminal status
In_Review	non-terminal status
Open	non-terminal status
Sent_for_Revision	non-terminal status
Submitted	non-terminal status

Workflow

The default workflow for the Submittal business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a Submittal Record

Create a Submittal record by navigating to Document Manager & Submittals / Submittal on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Submittal task that has been assigned to you from the Tasks log.

Complete the Submittal form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager & Submittals**, and then select **Submittal**.
3) On the Submittal 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Submittal.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Submittal but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Submittal Form

Key Information

Key information associated with the submittal process

Field Name	Access	Description
Manual Submittal Number	Required	Preferred Submittal Number schema per your company standards
Title	Required	The Title for this submittal
Spec Section	Editable	Specification section.
Sub Section	Editable	Sub section of Specification Section
Automated Submittal Revision #	Read-Only	The number is calculated automatically and counted based on every time a submittal is sent for Revise & Resubmit.
Manual Submittal Revision #	Editable	Used to track revision numbers manually

Participants

Key participants associated with the submittal process

Field Name	Access	Description
Submitter	Required	Person submitting this item. Any requests for revisions will be sent to this user.
Submitter User Email	Read-Only	Email address of the submitter
Submittal AE Reviewer	Required	Assigned Submittal Official Reviewer for this submittal item
AE Reviewer User Email	Read-Only	Email address of the Official Reviewer

Details

Details associated with this submittal

Field Name	Access	Description
Submittal Type	Editable	The Type of this submittal
Discipline	Editable	Select the Discipline specific to this document.
Submittal Location	Editable	Location at the project site relevant for this submittal
Submittal Priority	Editable	Priority from Low to Urgent. Medium is set as the default.
Area	Editable	The area, from a list of physical areas, related to this project or building
Critical Path Item?	Editable	Indicates whether the submittal item is on the schedule critical path
Submittal For Closeout?	Editable	Indicates that submittal needs to be tracked for closeout

Submittal Package

Information about the Submittal Package

Field Name	Access	Description
Submittal Package	Editable	Submittal Package linked to this submittal

Field Name	Access	Description
Submittal Package Name	Read-Only	The full name of the Submittal Package linked to this Submittal
Contract	Editable	The contract that is a reference to this record.
Vendor Name	Editable	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.

Date Tracking

Submittal Date tracking upon submission through all reviews to completion.

Field Name	Access	Description
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Anticipated Submission Date	Editable	Date anticipated for original submission
Anticipated Completion Date	Editable	Date anticipated for review to complete and terminate the submittal

Description

Detailed description about this Submittal. This information might appear in any formal printouts of the submittal item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Material Tracking

Tracking material delivery details of the submittal.

Field Name	Access	Description
Material Tracking Item?	Editable	Indicate whether this is a material submittal tracking item.
Lead Time	Editable	The expected number of calendar days that will be required for the material/services of the submittal to arrive
Anticipated Due Delivery Date	Editable	Date anticipated as delivery date
Delivered Via	Editable	Delivery method for material delivery of the submittal
Confirmed Delivery Date	Editable	Date confirmed with delivery of item
Tracking No	Editable	Tracking number based on material being delivered
Actual Delivery Date	Editable	Date the submittal item was actually delivered
Material Tracking Notes	Editable	Notes entered by stakeholders related to material and delivery dates

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current

Field Name	Access	Description
		workflow step.

Additional Information

The Submittal Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Submittal Date Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Date Picker UDF 2	Disabled	Reserved for future use by your organization
Submittal Decimal UDF 1	Disabled	Reserved for future use by your organization
Submittal Decimal UDF 2	Disabled	Reserved for future use by your organization
Submittal Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Submittal Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Submittal Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Submittal Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Submittal Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Submittal Text 255 UDF 1	Disabled	Reserved for future use by your organization
Submittal Text 255 UDF 2	Disabled	Reserved for future use by your organization
Submittal Text 255 UDF 3	Disabled	Reserved for future use by your organization
Submittal Text 255 UDF 4	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Submittal Long Text UDF 1	Disabled	Reserved for future use by your organization
Submittal Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Bluebeam Markups tab

Markup Properties

Summary of the key information for this Bluebeam markup.

Field Name	Access	Description
Subject	Read-Only	Type of markup from Bluebeam
Author	Read-Only	Person who created the markup in Bluebeam
Page	Read-Only	Page on which the markup or measurement resides
Status	Read-Only	Status of the markup from Bluebeam
Creation Date	Read-Only	Date and time the markup was created
Last Modified Date	Read-Only	Date and time the markup was last modified

Comment

Comment from Bluebeam

Field Name	Access	Description
Comment	Read-Only	Comment from Bluebeam

Session Information

Information about the Bluebeam session

Field Name	Access	Description
File Name	Read-Only	This field displays the file name.
Session Name	Read-Only	This field displays the session name.

Field Name	Access	Description
Session ID	Read-Only	This field displays the session ID.
File Revision Number	Read-Only	This field displays file revision number.
File Pub. Number	Read-Only	This field displays the file publish number.

Additional Information

Additional Information from Bluebeam

Field Name	Access	Description
Bluebeam UDF 1	Read-Only	Reserved for future use by your organization
Bluebeam UDF 2	Read-Only	Reserved for future use by your organization

Completing the Submittal Document Details tab

General

Field Name	Access	Description
Name	Editable	
System Document Type	Editable	Default System Document Types
Short Description	Required	
Title	Editable	
Description	Editable	
Issue Date	Editable	
Drawing Set Name	Editable	The Drawing Set is used to package or group a set of drawings.
Drawing Number	Editable	The Drawing Number associated to this document as it appears in the drawing document title block
Revision No.	Editable	
Drawing Revision Number	Editable	Specifies the revision number to the drawing as

Field Name	Access	Description
		described in the title block of the contract drawing
Drawing Revision Date	Editable	Date specified in the title block of the drawing for Drawing Revision Date
Drawing Notes	Editable	General notes that can be used to describe the drawing
Discipline	Editable	Select the Discipline specific to this document.
Variation From Contract Documents	Editable	Indicates a variation from contract documents
Variation From Contract Document Description	Editable	Describes variation from the contract document, if applicable
Line Item Status	Editable	Select the applicable status. **Active** is selected by default.

Submittal Package Business Process

Use the Submittal Package business process to group individual Submittal records into packages. This business process tracks key information for the package but also shows a live count of submittals not yet reviewed, in progress, and completed.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Accepted	non-terminal status
Canceled	non-terminal status
Completed	non-terminal status
Draft	non-terminal status
Rejected	non-terminal status

Creating a Submittal Package Record

Create a Submittal Package record by navigating to Document Manager & Submittals / Submittal Package on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Submittal Package form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Document Manager & Submittals**, and then select **Submittal Package**.
3) On the Submittal Package page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Submittal Package Form

Key Information

Key information about this Submittal Package is provided below.

Field Name	Access	Description
Submittal Package #	Required	Preferred Submittal Package Number schema per your company standards
Title	Required	The Title for this submittal package
Contract	Editable	The contract that is a reference to this record
Vendor Name	Editable	The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Status	Required	Specify the status of this record.

Key Dates

Key dates for tracking this Submittal Package

Field Name	Access	Description
Anticipated Submission Date	Editable	Date anticipated for original submission
Anticipated Completion Date	Editable	Date anticipated for completion of this Submittal Package
Actual Start Date	Editable	Date that the package was submitted
Actual Finish Date	Editable	Date that the package was completed

Description

Enter a description of this Submittal Package. This information might appear in any formal printouts of the submittal item.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Submittal Item Status

Displays the count of submittal items that belong to this package

Field Name	Access	Description
Not Yet Submitted	Read-Only	Displays the count of linked submittals attached to this submittal package that are classified as "Not yet Submitted"
In Progress	Read-Only	Displays the count of linked submittals attached to this submittal package that are classified as "In Progress"
Closed	Read-Only	Displays the count of linked submittals attached to this submittal package that are classified as "Closed"
Percent Complete	Read-Only	Displays the count of linked submittals attached to this

Field Name	Access	Description
		submittal package that have reached their final status

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Additional Information

The Submittal Package Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Submittal Pkg Date Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Date Picker UDF 2	Disabled	Reserved for future use by your organization
Submittal Pkg Decimal UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Decimal UDF 2	Disabled	Reserved for future use by your organization
Submittal Pkg Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Submittal Pkg Currency Amount UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Submittal Pkg Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Submittal Pkg Picker UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Submittal Package Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Submittal Pkg Text 255 UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Text 255 UDF 2	Disabled	Reserved for future use by your organization
Submittal Pkg Text 255 UDF 3	Disabled	Reserved for future use by your organization
Submittal Pkg Text 255 UDF 4	Disabled	Reserved for future use by your organization
Submittal Pkg Long Text UDF 1	Disabled	Reserved for future use by your organization
Submittal Pkg Long Text UDF 2	Disabled	Reserved for future use by your organization

Completing the Standard tab

General

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Notes	Editable	Any additional notes or resolutions

Information

Project Configuration Business Process

Use the Project Configuration business process to store default values used throughout the project. Settings such as approval thresholds, folders to which business processes publish their documents, and the Specification Section Template are managed here.

Characteristics

This is a Project-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Updating a Project Configuration Record

Update a Project Configuration record by navigating to Information / General / Project Configuration on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab.

Complete the Project Configuration form and attach related documents, if needed. After updating the form, click Save to update a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to your Project tab and switch to **User** mode.
2) In the left Navigator, select **Information**, and then select **General**.
3) In the **General** log, open **Project Configuration**.
4) Click **Edit**. Refer to the tables below to update the form. You can click **Save** at any time to update a record and keep it in editable mode.
5) To add attachments, click **Attach Files** on the **Attachments** tab.
6) After completing the form, click **Submit**.

Completing the Project Configuration Form

General Settings

Templates to use in this project. Selecting the Folder Template will update the default publish path for every business process.

Field Name	Access	Description
Folder Template	Editable	Specifies the folder template to be used on this project that controls the

Field Name	Access	Description
		location of BP-specific files in the Document Manager
Area Template	Editable	The area template that contains the physical areas related to a project or building
Spec Section Template	Editable	The specification section template used for this project
Report Configuration	Editable	The report configuration to use on this project. This specifies the default colors and images that must be used on the custom prints and reports.
Program	Editable	Number and name of the Program for a project
Form Configuration	Editable	Controls which Dynamic Data Set (DDS) will be used for the forms in this project. The DDSs are used to control the behavior (editable, required, or disabled) on specific fields.
Project Time Zone	Editable	Indicate the time zone that should be used for all Custom Prints and Custom Reports. If you want to use the time zone of the user initiating the custom print or report, select the User Time Zone option.
Date Format	Editable	This field controls the date format used for all Custom Prints and Custom Reports in this project. (For more information, see Oracle Format Mask in the Oracle Analytics Server documentation.) To use the date format of the user initiating the custom print or report, select User.

Action Items

Field Name	Access	Description
Default Action Items Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Action Items form

Actuals

Field Name	Access	Description
Default Actuals Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Actuals form
Actuals - Use Acknowledge Step	Editable	If selected, the system routes the Actuals workflow to the acknowledge step, upon approval, instead of sending the workflow to the end step.
Actuals L1 Minimum Approval Threshold	Editable	The Actuals minimum dollar threshold for Level 1 approval
Actuals L2 Minimum Approval Threshold	Editable	The Actuals minimum dollar threshold for Level 2 approval
Actuals L3 Minimum Approval Threshold	Editable	The Actuals minimum dollar threshold for Level 3 approval

Architect's Supplemental Instructions

Field Name	Access	Description
Default Architect Supplemental Instruction Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Architect Supplemental Instruction form
ASI Cost Impact Default	Editable	Indicates the default setting for Architect Supplemental

Field Name	Access	Description
		Instruction (ASI) cost impact
ASI Schedule Impact Default	Editable	Indicates the default setting for ASI schedule impact

Budget Changes

Field Name	Access	Description
Default Budget Change Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Budget Change form
Budget Change - Use Acknowledge Step	Editable	If selected, the system routes the Budget Change workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Budget Change: Compare revised budget to thresholds?	Editable	If selected, the revised amount (revised budget + current change) will be compared to the minimum thresholds. If not selected, only the current change will be compared to the minimum thresholds. Ensure that your minimum approval thresholds are updated to reflect any changes to this field.
Budget Change L1 Minimum Approval Threshold	Editable	The Budget Change minimum dollar threshold for Level 1 approval
Budget Change L2 Minimum Approval Threshold	Editable	The Budget Change minimum dollar threshold for Level 2 approval
Budget Change L3 Minimum Approval Threshold	Editable	The Budget Change minimum dollar threshold for Level 3 approval

Budget Transfers

Field Name	Access	Description
Default Budget Transfer Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Budget Transfer form
Budget Transfer - Use Acknowledge Step	Editable	If selected, the system routes the Budget Change workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Budget Transfer L1 Minimum Approval Threshold	Editable	The Budget Transfer minimum dollar threshold for Level 1 approval. Note that because the Budget Transfer records always have a net sum of zero, this minimum is the total credit amount from within the record.
Budget Transfer L2 Minimum Approval Threshold	Editable	The Budget Transfer minimum dollar threshold for Level 2 approval. Note that because the Budget Transfer records always have a net sum of zero, this minimum is the total credit amount from within the record.
Budget Transfer L3 Minimum Approval Threshold	Editable	The Budget Transfer minimum dollar threshold for Level 3 approval. Note that because the Budget Transfer records always have a net sum of zero, this minimum is the total credit amount from within the record.

Change Directives

Field Name	Access	Description
Default Change Directive	Editable	The location of the folder in

Field Name	Access	Description
Publish Path		Document Manager that includes the attached documents for the Change Directive form
Change Directive - Use Acknowledge Step	Editable	If selected, the system routes the Change Directive workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Change Directive L1 Minimum Approval Threshold	Editable	The Change Directive minimum dollar threshold for Level 1 approval
Change Directive L2 Minimum Approval Threshold	Editable	The Change Directive minimum dollar threshold for Level 2 approval
Change Directive L3 Minimum Approval Threshold	Editable	The Change Directive minimum dollar threshold for Level 3 approval

Change Orders

Field Name	Access	Description
Default Change Order Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Change Order form.
Change Order - Use Acknowledge Step	Editable	If selected, the system routes the Change Order workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Change Order: Compare revised commitment to thresholds?	Editable	If selected, the revised amount (revised commitment + current change) will be compared to the minimum thresholds. If not selected, only the current change will be

Field Name	Access	Description
		compared to the minimum thresholds. Ensure that your minimum approval thresholds are updated to reflect any changes to this field.
Change Order L1 Minimum Approval Threshold	Editable	The Change Order minimum dollar threshold for Level 1 approval
Change Order L2 Minimum Approval Threshold	Editable	The Change Order minimum dollar threshold for Level 2 approval
Change Order L3 Minimum Approval Threshold	Editable	The Change Order minimum dollar threshold for Level 3 approval

Change Requests

Field Name	Access	Description
Default Change Request Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Change Request form
Change Request - Use Acknowledge Step	Editable	If selected, the system routes the Change Request workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Change Request: Compare potential commitment to thresholds?	Editable	If selected, the revised amount (revised commitment + current change request) will be compared to the minimum thresholds. If not selected, only the current change will be compared to the minimum thresholds. Ensure that your minimum approval thresholds are updated to reflect any

Field Name	Access	Description
		changes to this field.
Create a Change Order?	Editable	To create a change order automatically, upon approval of this record
Change Request L1 Minimum Approval Threshold	Editable	The Change Request minimum dollar threshold for Level 1 approval
Change Request L2 Minimum Approval Threshold	Editable	The Change Request minimum dollar threshold for Level 2 approval
Change Request L3 Minimum Approval Threshold	Editable	The Change Request minimum dollar threshold for Level 3 approval

Communications Management

Field Name	Access	Description
Default Communications Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Communications form

Contracts

Field Name	Access	Description
Default Contract Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Contract form
Contract - Use Acknowledge Step	Editable	If selected, the system routes the Contract workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Create a Notice to Proceed?	Editable	If selected, automatically creates a Notice to Proceed (NTP) upon approval of the Contract.

Field Name	Access	Description
Contract L1 Minimum Approval Threshold	Editable	The Contract minimum dollar threshold for Level 1 approval
Contract L2 Minimum Approval Threshold	Editable	The Contract minimum dollar threshold for Level 2 approval
Contract L3 Minimum Approval Threshold	Editable	The Contract minimum dollar threshold for Level 3 approval
Contract - Default Payment Terms	Editable	The default payment terms (in days) for contracts
Default Work Retainage %	Editable	The default percentage retained on work or services delivered from the Schedule of Values (SOV)
Default Stored Materials Retainage %	Editable	The default percentage retained on stored materials from the SOV

Daily Reports

Field Name	Access	Description
Default Daily Reports Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Daily Reports form

Document Approval

Field Name	Access	Description
Default Document Approval Publish Path	Editable	Specifies the folder where documents attached to the Document Approval form will be stored in the Document Manager

Estimates

Field Name	Access	Description
Default Estimate Publish Path	Editable	The location of the folder in Document Manager that includes the attached

Field Name	Access	Description
		documents for the Estimate form
Create an Initial Budget on Approval?	Editable	If selected, the system automatically creates an initial budget record after the estimated budget is approved. **Note:** Excluded line items are not included in the initial budget record.

Field Observations

Field Name	Access	Description
Default Field Observation Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Field Observation form

Forecasts

Field Name	Access	Description
Default Forecast Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Forecast form
Create a Budget Change on Approval?	Editable	If selected, the system automatically creates a budget change record after the forecast is approved. **Note:** The excluded line items are not included in the created budget.

Fund Appropriations

Field Name	Access	Description
Default Fund Appropriations Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Fund Appropriations form

Field Name	Access	Description
Fund Appropriations - Use Acknowledge Step	Editable	If selected, the system routes the Fund Appropriations workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Fund Appropriations L1 Minimum Approval Threshold	Editable	The Fund Appropriations minimum dollar threshold for Level 1 approval
Fund Appropriations L2 Minimum Approval Threshold	Editable	The Fund Appropriations minimum dollar threshold for Level 2 approval
Fund Appropriations L3 Minimum Approval Threshold	Editable	The Fund Appropriations minimum dollar threshold for Level 3 approval

Incident Management

Field Name	Access	Description
Default Incident Management Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Incident Management form

Initial Budgets

Field Name	Access	Description
Default Initial Budget Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Initial Budget form
Initial Budget - Use Acknowledge Step	Editable	If selected, the system routes the Initial Budget workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Initial Budget Required	Editable	To enable validation of the Initial Budget Record when

Field Name	Access	Description
		Budget Changes or Budget Transfers are created, select this option.
Initial Budget L1 Minimum Approval Threshold	Editable	The Initial Budget minimum dollar threshold for Level 1 approval
Initial Budget L2 Minimum Approval Threshold	Editable	The Initial Budget minimum dollar threshold for Level 2 approval
Initial Budget L3 Minimum Approval Threshold	Editable	The Initial Budget minimum dollar threshold for Level 3 approval

Invoices

Field Name	Access	Description
Default Invoice Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Invoice form
Invoice - Use Acknowledge Step	Editable	If selected, the system routes the Invoice workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Invoice L1 Minimum Approval Threshold	Editable	The Invoice minimum dollar threshold for Level 1 approval
Invoice L2 Minimum Approval Threshold	Editable	The Invoice minimum dollar threshold for Level 2 approval
Invoice L3 Minimum Approval Threshold	Editable	The Invoice minimum dollar threshold for Level 3 approval

Issues

Field Name	Access	Description
Default Issues Publish Path	Editable	The location of the folder in Document Manager that

Field Name	Access	Description
		includes the attached documents for the Issues form.

Journal Entries

Field Name	Access	Description
Default Journal Entry Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Master Areas form
Journal Entry - Use Acknowledge Step	Editable	If selected, the system routes the Journal Entry workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Journal Entry L1 Minimum Approval Threshold	Editable	The Journal Entry minimum dollar threshold for Level 1 approval
Journal Entry L2 Minimum Approval Threshold	Editable	The Journal Entry minimum dollar threshold for Level 2 approval
Journal Entry L3 Minimum Approval Threshold	Editable	The Journal Entry minimum dollar threshold for Level 3 approval

Lessons Learned

Field Name	Access	Description
Default Lessons Learned Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Lessons Learned form

Meeting Minutes

Field Name	Access	Description
Default Meeting Minutes Publish Path	Editable	The location of the folder in Document Manager that includes the attached

Field Name	Access	Description
		documents for the Meeting Minutes form

Miscellaneous Costs

Field Name	Access	Description
Default Miscellaneous Cost Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Miscellaneous Cost form
Miscellaneous Cost - Use Acknowledge Step	Editable	If selected, the system routes the Miscellaneous Cost workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Miscellaneous Cost L1 Minimum Approval Threshold	Editable	The Miscellaneous Cost minimum dollar threshold for Level 1 approval
Miscellaneous Cost L2 Minimum Approval Threshold	Editable	The Miscellaneous Cost minimum dollar threshold for Level 2 approval
Miscellaneous Cost L3 Minimum Approval Threshold	Editable	The Miscellaneous Cost minimum dollar threshold for Level 3 approval

Notices to Proceed

Field Name	Access	Description
Default Notice to Proceed Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Notice to Proceed form

Owner Walk Throughs

Field Name	Access	Description
Default Owner Walk Through Publish Path	Editable	The location of the folder in Document Manager that includes the attached

Field Name	Access	Description
		documents for the Owner Walk Through form

Payment Applications

Field Name	Access	Description
Default Payment Application Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Payment Application form
Payment Application - Use Acknowledge Step	Editable	If selected, the system routes the Payment Application workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Keep Stored Materials	Editable	If you select Yes, the stored materials will remain in the Materials Presently Stored column until they are moved. If you select No, the stored materials will automatically move to the Work Previously Completed column.
Effective Date Calculation Method	Editable	Determines which date will be used to populate the Effective Date field in the line items of a payment. This ultimately determines which period the costs will affect the cash flow.
Amount Calculation Method	Editable	Determines which amount (net or gross) will be sent to the cost sheet and cash flow. Net will send the Total Completed and Stored to Date minus retainage (post-retainage). Gross will send the Total Completed and Stored to Date

Field Name	Access	Description
		(pre-retainage).
Payment Application L1 Minimum Approval Threshold	Editable	The Payment Application minimum dollar threshold for Level 1 approval
Payment Application L2 Minimum Approval Threshold	Editable	The Payment Application minimum dollar threshold for Level 2 approval
Payment Application L3 Minimum Approval Threshold	Editable	The Payment Application minimum dollar threshold for Level 3 approval

PO Amendments

Field Name	Access	Description
Default PO Amendment Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Purchase Order Amendment
PO Amendment - Use Acknowledge Step	Editable	If selected, the system routes the Purchase Order Amendment workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
PO Amendment: Compare revised commitment to thresholds?	Editable	If selected, the revised amount (revised Purchase Order amount + current change) will be compared to the minimum thresholds. If not selected, only the current change will be compared to the minimum thresholds. Ensure that your minimum approval thresholds are updated to reflect any changes to this field.
PO Amendment L1 Minimum Approval Threshold	Editable	The Purchase Order Amendment minimum dollar threshold for Level 1 approval

Field Name	Access	Description
PO Amendment L2 Minimum Approval Threshold	Editable	The Purchase Order Amendment minimum dollar threshold for Level 2 approval
PO Amendment L3 Minimum Approval Threshold	Editable	The Purchase Order Amendment minimum dollar threshold for Level 3 approval

Project Closeout

Field Name	Access	Description
Default Closeout Cklist Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Closeout Checklist form

Project Notes

Field Name	Access	Description
Default Project Note Publish Path	Editable	Specifies the folder where documents attached to Project Notes will be stored in the Document Manager

Project Status

Field Name	Access	Description
Default Project Status Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Project Status form

Project Timesheet

Field Name	Access	Description
Default Project Timesheet Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Project Timesheet form
Project Timesheet - Use	Editable	If selected, the system

Field Name	Access	Description
Acknowledge Step		routes the Project Timesheet workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Project Timesheet L1 Minimum Approval Threshold	Editable	The Project Timesheet minimum dollar threshold for Level 1 approval
Project Timesheet L2 Minimum Approval Threshold	Editable	The Project Timesheet minimum dollar threshold for Level 2 approval
Project Timesheet L3 Minimum Approval Threshold	Editable	The Project Timesheet minimum dollar threshold for Level 3 approval

Punch Lists

Field Name	Access	Description
Default Punch List Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Punch List form

Purchase Orders

Field Name	Access	Description
Default Purchase Orders Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Purchase Order form
Purchase Orders - Use Acknowledge Step	Editable	If selected, the system routes the purchase order workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Purchase Orders L1 Minimum Approval Threshold	Editable	The Purchase Order minimum dollar threshold for Level 1 approval

Field Name	Access	Description
Purchase Orders L2 Minimum Approval Threshold	Editable	The Purchase Order minimum dollar threshold for Level 2 approval
Purchase Orders L3 Minimum Approval Threshold	Editable	The Purchase Order minimum dollar threshold for Level 3 approval

Request for Bid

Field Name	Access	Description
Default Request for Bid Publish Path	Editable	Specifies the folder where documents attached to the Request for Bid form will be stored in the Document Manager
Override Options Setting	Editable	This field determines whether the bidder is allowed to override the quantity or Unit of Measure.
Require Bid Attachments	Editable	To require bidders to add attachments, select this option.

Requests for Information

Field Name	Access	Description
Default Request for Information Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Request for Information (RFI) form
RFI Cost Impact Default	Editable	The default setting for the RFI cost impact
RFI Schedule Impact Default	Editable	The default setting for the RFI schedule impact
Send from A/E Review to	Editable	Determines the final route after the A/E Review based on whether a project coordinator is involved, or final response for an owner to provide final review, or to end step allowing A/E to

Field Name	Access	Description
		end and close the RFI.
RFI - Use Acknowledge Step	Editable	If selected, the system routes the RFI workflow to the acknowledge step, upon approval, instead of sending the workflow to the end step. This controls whether the RFI creator is sent a task or just CCed at the end of the workflow.

Risks

Field Name	Access	Description
Default Risks Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Risks form
Cost Impact Weighting	Editable	The weighting for the cost impact when calculating the risk score
Schedule Impact Weighting	Editable	The weighting for the schedule impact when calculating the risk score
Scope Impact Weighting	Editable	The weighting for the scope impact when calculating the risk score
Reputation Impact Weighting	Editable	The weighting for the reputation impact when calculating the risk score
Environmental Impact Weighting	Editable	The weighting for the environmental impact when calculating the risk score

Submittal and Submittal Packages

Field Name	Access	Description
Default Submittals Item Publish Path	Editable	Specifies the folder where documents attached to the Submittal Item form will be stored in the Document Manager

Field Name	Access	Description
Default Submittal Pkg Publish Path	Editable	Specifies the folder where documents attached to the Submittal Package form will be stored in the Document Manager
Submittal - Use Final Coordination Review Step	Editable	
Initial Submittal Revision Number	Editable	Specifies the initial number used for the Submittal revision counter. You are encouraged to use a value of 0 or 1.

Warranties

Field Name	Access	Description
Default Warranty Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Warranty form

Work Releases

Field Name	Access	Description
Default Work Release Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Work Release form
Work Release - Use Acknowledge Step	Editable	If selected, the system routes the Work Release workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Work Release L1 Minimum Approval Threshold	Editable	The Work Release minimum dollar threshold for Level 1 approval
Work Release L2 Minimum Approval Threshold	Editable	The Work Release minimum dollar threshold for Level 2 approval

Field Name	Access	Description
Work Release L3 Minimum Approval Threshold	Editable	The Work Release minimum dollar threshold for Level 3 approval

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Required	Status of the project
Project Number	Read-Only	Unique Project Number
Project Name	Read-Only	Name of the project
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated

BP Data Transfer Business Process

The BP Data Transfer business process is an administrative business process used as a mechanism to get data from the Project Request BP to the resulting Project shell. This BP:

- Populates data on the Project Configuration BP.
- Adds users selected on the Project Request BP record to the Project Manager, Project Coordinator, Project Sponsor, and Finance groups.
- Moves attachments from the Project Request BP record to the Document Manager for the project.
- If template records are selected in the Project Configuration BP record in the Project Template, auto-creates an Estimate BP and a Project Closeout Checklist BP.

Characteristics

This is a Project-level business process with a workflow, provided in the system template.

Record Statuses

Completed	terminal status

Workflow

The default workflow for the BP Data Transfer business process is set up in a certain way; however, your organization might use it differently. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The BP Data Transfer business process might create the following business processes: Estimate, Project Closeout Checklist

The BP Data Transfer business process might be created by the following business processes: Project Request

Creating a BP Data Transfer Record

Create a BP Data Transfer record by navigating to Information / General / BP Data Transfer on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing BP Data Transfer task that has been assigned to you from the Tasks log.

Complete the BP Data Transfer form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Information**, select **General**, and then select **BP Data Transfer**.
3) On the BP Data Transfer 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this BP Data Transfer.
   - If permitted, you can add users to the CC list. These users will receive a notification about this BP Data Transfer but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the BP Data Transfer Form

General

Data flows from Project Requests to BP Data Transfer, and it assigns users to their applicable project/shell-level user groups.

Field Name	Access	Description
Project Manager	Editable	Project Manager for this project
Project Sponsor	Editable	The sponsor of the project
Finance and Legal Responsible Officer	Editable	The officer responsible for finance and legal
Project Coordinator	Editable	The coordinator of the project
Status	Read-Only	

Record Templates

Automatically creates records and the corresponding line items in the current project. (This eliminates the need to add the CBS Code-based line items or a standard set of closeout items manually.) The template records are specified in the Project Configuration business process.

Field Name	Access	Description
Estimate Record Template	Editable	Estimate record to use as a template when creating a new record in this project
Estimate Record	Read-Only	Link to the created Estimate record, after it is created
Project Closeout Checklist Record Template	Editable	Project Closeout Checklist record to use as a template when creating a new record in this project
Project Closeout Checklist Record	Read-Only	Link to the created Project Closeout Checklist record, after it is created

System Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that this record was last updated
Creation Date	Read-Only	Date that the record was

Field Name	Access	Description
		created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Organization-Level Business Processes

This section outlines the Business Processes available at the organizational level.

In This Section

Actuals Importer Business Process

Use the Actuals Importer business process exclusively for bulk creation of Actual business process records across multiple projects at once.

Characteristics

This is an Organization-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Actuals Importer business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Actuals Importer business process might create the following business processes: Actual

The Actuals Importer business process might be created by the following business processes: Not applicable

Creating an Actuals Importer Record

Create an Actuals Importer record by navigating to Actuals / Actuals Importer on the Organization tab, or from the Tasks log on the Organization or Home tab. Act on an existing Actuals Importer task that has been assigned to you from the Tasks log.

Complete the Actuals Importer form and attach related documents, if needed. After completing the form, click Send and 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 Organization tab and switch to **User** mode.
2) In the left Navigator, select **Actuals**, and then select **Actuals Importer**.
3) On the Actuals Importer 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Actuals Importer.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Project Status but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Actuals Importer Form

Key Information

Key information about this Actuals Importer record

Field Name	Access	Description
Title	Editable	Title of the record
Amount	Read-Only	Total amount (sum of amounts for all line items)
Period Start	Editable	The start date for the Payment Application being billed
Period End	Editable	The end date for the Payment Application being billed

Field Name	Access	Description
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.

Description

Change description, assumptions, justification, and anything else needed for this Actuals Importer.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Currency

If the currency of this Actual is different from the project currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.
Project Currency Rate Override	Editable	Overrides the project currency exchange rate for this record. This can only be specified on the first step of the workflow.
Base Currency Rate Override	Editable	Overrides the base currency exchange rate for this record. This can only be specified on the first step of the workflow.

Completing the Standard tab

Main Form

The information here will be used in the main form of the created Actuals records down at the project level. For multiple lines to be created within a single Project Actuals record, the information in this block must be an exact match.

Field Name	Access	Description
Destination Project	Required	Project where the Actuals record is created
Shell location	Read-Only	
Payment No.	Required	Indicates the payment number, which might include the check number,

Field Name	Access	Description
		wire number, electronic funds transfer (EFT) number, and so on.
Title	Editable	Title of the record
Actual Type	Editable	Type of actual, used for classification and reporting
Actuals Record	Read-Only	Link to the created Actuals record, after it is created
Payment Date	Editable	Date of the payment
Payment Processed Date	Editable	Date the payment was processed by the finance department
Vendor	Editable	Select the vendor for this record.
Legal Vendor Name	Editable	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.
Vendor ID	Editable	Populates based on the selected Vendor. Can be manually completed if no Vendor record exists.

General

Cost Code for this Actuals line item

Field Name	Access	Description
Cost Code	Required	Enter a cost code.
Code Name	Read-Only	Populates the code name of the selected cost code

Actuals Details

Cost for this line item. This can be entered as either lump sum or unit rate.

Field Name	Access	Description
Item Quantity	Required	Enter the item quantity.
Unit of Measure	Editable	The unit-of-measure used when reporting costs per

Field Name	Access	Description
		project unit.
Item Unit Cost	Required	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Description for this Actuals line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Description	Editable	Enter any additional information to the short description. This field can be expanded, if needed.

Additional Information

Additional information specific to this Actuals line item.

Field Name	Access	Description
Effective Date	Required	Enter the date this record takes effect.
Spend Category	Editable	Select the spending category.

Custom Fields

The Custom Fields block is reserved for future use by your organization.

Field Name	Access	Description
Actuals Line Item Picker UDF 1	Disabled	Reserved for future use by your organization
Actuals Line Item Text 255 UDF 1	Disabled	Reserved for future use by your organization

Main Form Additional Information

The Main Form Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Actuals Date Picker UDF 1	Disabled	Reserved for future use by your organization
Actuals Date Picker UDF 2	Disabled	Reserved for future use by

Field Name	Access	Description
		your organization
Actuals Decimal UDF 2	Disabled	Reserved for future use by your organization
Actuals Decimal UDF 1	Disabled	Reserved for future use by your organization
Actuals Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Actuals Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Actuals Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Actuals Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Actuals Picker UDF 1	Disabled	Reserved for future use by your organization
Actuals Picker UDF 2	Disabled	Reserved for future use by your organization

Main Form Additional Notes

The Main Form Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Actuals Text 255 UDF 1	Disabled	Reserved for future use by your organization
Actuals Text 255 UDF 2	Disabled	Reserved for future use by your organization
Actuals Text 255 UDF 3	Disabled	Reserved for future use by your organization
Actuals Text 255 UDF 4	Disabled	Reserved for future use by your organization
Actuals Long Text UDF 1	Disabled	Reserved for future use by your organization
Actuals Long Text UDF 2	Disabled	Reserved for future use by your organization

Timesheet Business Process

On approval, the Timesheet business process automatically creates Timesheet records at the company level.

Characteristics

This is an Organization-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status
Awaiting_Review	non-terminal status
Pending_Approval	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Timesheet business process is set up in a certain way; however, your organization might use it differently. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Related Processes

The Timesheet business process might create the following business processes: Project Timesheet

The Timesheet business process might be created by the following business processes: Not applicable

Creating a Timesheet Record

Create a Timesheet record by navigating to Project Management / Timesheet on the Organization tab, or from the Tasks log on the Organization or Home tab. Act on an existing Timesheet task that has been assigned to you from the Tasks log.

Complete the Timesheet form and attach related documents, if needed. After completing the form, click Send and 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 Organization tab and switch to **User** mode.
2) In the left Navigator, select **Project Management**, and then select **Timesheet**.

3) On the Timesheet 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Timesheet.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Timesheet but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Timesheet Form

Key Information

Key Information about this Timesheet record

Field Name	Access	Description
Resource	Required	Defaults to the name of the current signed-in user; however, another authorized user's name can be specified.
Resource ID	Read-Only	The ID of selected the resource
Period Start	Required	Starting Monday for the period of this timesheet
Title	Read-Only	Title of the record
Role	Required	The system automatically populates this field with the role associated with the selected resource.
Manager	Read-Only	The system automatically populates this field with the name of the manager associated with the selected resource.

Description

This information might appear in any formal printouts of this Timesheet.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded. The business processes selected for auto-creation will copy this detailed description to the destination business process.

Hours Summary

Summary of the hours entered on the project and non-project tabs

Field Name	Access	Description
Total Project Hours	Read-Only	Total Project Hours, from the Project Hours tab
Total Non-Project Hours	Read-Only	Total Non-Project Hours, from the Non-Project Hours tab
Total Hours	Read-Only	Total Hours from all tabs

Hours Details

Breakdown of the hours entered on the project and non-project tabs

Field Name	Access	Description
Monday Date	Read-Only	Monday's date, based on the Period Start
Monday Project Hours	Read-Only	Total Monday Project Hours, from the Project Hours tab
Monday Non-Project Hours	Read-Only	Total Monday Non-Project Hours, from the Non-Project Hours tab
Monday Total Hours	Read-Only	Total Monday Hours, from all tabs
Tuesday Date	Read-Only	Tuesday's date, based on the Period Start
Tuesday Project Hours	Read-Only	Total Tuesday Project

Field Name	Access	Description
		Hours, from the Project Hours tab
Tuesday Non-Project Hours	Read-Only	Total Tuesday Non-Project Hours, from the Non-Project Hours tab
Tuesday Total Hours	Read-Only	Total Tuesday Hours, from all tabs
Wednesday Date	Read-Only	Wednesday's date, based on the Period Start
Wednesday Project Hours	Read-Only	Total Wednesday Project Hours, from the Project Hours tab
Wednesday Non-Project Hours	Read-Only	Total Wednesday Non-Project Hours, from the Non-Project Hours tab
Wednesday Total Hours	Read-Only	Total Wednesday Hours, from all tabs
Thursday Date	Read-Only	Thursday's date, based on the Period Start
Thursday Project Hours	Read-Only	Total Thursday Project Hours, from the Project Hours tab
Thursday Non-Project Hours	Read-Only	Total Thursday Non-Project Hours, from the Non-Project Hours tab
Thursday Total Hours	Read-Only	Total Thursday Hours, from all tabs
Friday Date	Read-Only	Friday's date, based on the Period Start
Friday Project Hours	Read-Only	Total Friday Project Hours, from the Project Hours tab
Friday Non-Project Hours	Read-Only	Total Friday Non-Project Hours, from the Non-Project Hours tab
Friday Total Hours	Read-Only	Total Friday Hours, from all tabs
Saturday Date	Read-Only	Saturday's date, based on the Period Start

Field Name	Access	Description
Saturday Project Hours	Read-Only	Total Saturday Project Hours, from the Project Hours tab
Saturday Non-Project Hours	Read-Only	Total Saturday Non-Project Hours, from the Non-Project Hours tab
Saturday Total Hours	Read-Only	Total Saturday Hours, from all tabs
Sunday Date	Read-Only	Sunday's date, based on the Period Start
Sunday Project Hours	Read-Only	Total Sunday Project Hours, from the Project Hours tab
Sunday Non-Project Hours	Read-Only	Total Sunday Non-Project Hours, from the Non-Project Hours tab
Sunday Total Hours	Read-Only	Total Sunday Hours, from all tabs

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.

Additional Information

The Timesheet Additional Information block is reserved for future use by your organization.

Field Name	**Access**	**Description**
Timesheet Date Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Date Picker UDF 2	Disabled	Reserved for future use by your organization
Timesheet Decimal UDF 1	Disabled	Reserved for future use by your organization
Timesheet Decimal UDF 2	Disabled	Reserved for future use by your organization
Timesheet Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Timesheet Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Timesheet Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Timesheet Picker UDF 1	Disabled	Reserved for future use by your organization
Timesheet Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The Timesheet Additional Notes block is reserved for future use by your organization.

Field Name	**Access**	**Description**
Timesheet Text 255 UDF 1	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 2	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 3	Disabled	Reserved for future use by your organization
Timesheet Text 255 UDF 4	Disabled	Reserved for future use by your organization
Timesheet Long Text UDF 1	Disabled	Reserved for future use by your organization
Timesheet Long Text UDF	Disabled	Reserved for future use by

Field Name	Access	Description
2		your organization

Currency

If the currency of this Timesheet is different from the base currency, specify it here.

Field Name	Access	Description
Transaction Currency	Editable	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Rate in Project Currency	Read-Only	Exchange rate that will be used to calculate the Project Currency Amount. This will be set after the record is saved, submitted, or sent forward in the workflow. After it is set for a record, it cannot be changed.
Project Currency Amount	Read-Only	This field shows the amount of the transaction, according to the project currency.

Completing the Project Hours tab

General

Field Name	Access	Description
Project	Required	Select a project.
Role	Required	Role (ID and Name) for this timesheet
Use Overtime Rate	Editable	Select this checkbox to use the overtime rate for the role instead of the standard rate.
Cost Code	Required	Select the correct timesheet cost code for your organization.

Field Name	Access	Description
Code Name	Read-Only	Name that corresponds to the selected cost code
Monday Project Hours	Editable	Total Monday Project Hours, from the Project Hours tab
Tuesday Project Hours	Editable	Total Tuesday Project Hours, from the Project Hours tab
Wednesday Project Hours	Editable	Total Wednesday Project Hours, from the Project Hours tab
Thursday Project Hours	Editable	Total Thursday Project Hours, from the Project Hours tab
Friday Project Hours	Editable	Total Friday Project Hours, from the Project Hours tab
Saturday Project Hours	Editable	Total Saturday Project Hours, from the Project Hours tab
Sunday Project Hours	Editable	Total Sunday Project Hours, from the Project Hours tab
Total Project Hours	Read-Only	Total Project Hours for this line item

Description

Description of the project hours worked

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.

Completing the Non-Project Hours tab

General

Field Name	Access	Description
Time Category	Required	Used to categorize non-project hours
Monday Non-Project Hours	Editable	Total Monday Non-Project Hours, from the Non-Project

Field Name	Access	Description
		Hours tab
Tuesday Non-Project Hours	Editable	Total Tuesday Non-Project Hours, from the Non-Project Hours tab
Wednesday Non-Project Hours	Editable	Total Wednesday Non-Project Hours, from the Non-Project Hours tab
Thursday Non-Project Hours	Editable	Total Thursday Non-Project Hours, from the Non-Project Hours tab
Friday Non-Project Hours	Editable	Total Friday Non-Project Hours, from the Non-Project Hours tab
Saturday Non-Project Hours	Editable	Total Saturday Non-Project Hours, from the Non-Project Hours tab
Sunday Non-Project Hours	Editable	Total Sunday Non-Project Hours, from the Non-Project Hours tab
Total Non-Project Hours	Read-Only	Total Non-Project Hours for this line item

Description

Description of the non-project hours worked

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.

Company-Level Business Processes

This section outlines the Business Processes available at the company level.

In This Section

Company Logs

Master Service Agreement Business Process

Use the Master Service Agreement (MSA) business process to track company-level arrangements that enable agreements with vendors to provide services across multiple projects. By using the Work Release business process, this business process is released on a per-project/per-period basis with work authorizations against a previously determined maximum.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Approved	non-terminal status
Awaiting_Review	non-terminal status
Canceled	non-terminal status
Pending_Approval	non-terminal status
Rejected	non-terminal status
Sent_for_Revision	non-terminal status

Creating a Master Service Agreement Record

Create a Master Service Agreement record by navigating to Company Logs / Master Service Agreement on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Master Service Agreement form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

Note: You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Logs**, and then select **Master Service Agreement**.
3) On the Master Service Agreement page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) Click **Add Attachment,** select **Unifier Folder**, select a file, and click **OK.** The **Attachments** link indicates one file is attached to the record.
5) After completing the form, click **Submit**.

Completing the Master Service Agreement Form

Key Information

Key information about this MSA is provided below.

Field Name	Access	Description
Title	Required	Enter a title.
Vendor	Required	Select the vendor for this record.
Contract Number	Editable	The unique number for the contract, which might come from a corporate financial system
Amount	Read-Only	Amount of this record or line item
Due Date	Editable	Target completion date for this record. A default duration has been set by your administrator but can be overridden here for this record.
Status	Required	Enter the record status.

Description

Enter the description or scope of this MSA. This information might appear in any formal printouts of this MSA.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description

Field Name	Access	Description
		field. The field size can be expanded.

MSA Details

Details about the MSA should be entered below.

Field Name	Access	Description
MSA Contract Type	Editable	The contract vehicle that is used for the MSA
Priority	Editable	The priority of this record
Effective Date	Required	Enter the date this record takes effect.
Contract Completion Date	Editable	The target completion date of the contract
Payment Terms	Editable	The payment terms (in days) for this contract

Default Units

Use the fields below to specify how this MSA will be built. The selections here will be used for new line items that are added but can be changed per line item.

Field Name	Access	Description
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.
Unit Quantity	Editable	Unit quantity to be used to calculate the Cost Per Unit for this record
Cost per Unit	Read-Only	The total cost divided by the unit quantity for this record

Vendor Information

Details of the Vendor for this MSA

Field Name	Access	Description
Legal Vendor Name	Read-Only	Lists the legal vendor name if the vendor name is different from the vendor full legal business name, the vendor has a name longer than 50 characters, or both.

Field Name	Access	Description
Vendor ID	Read-Only	Populates based on the selected Vendor. If not integrated with an external system, leave blank.
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Contact Email	Editable	Contact email address for the main vendor

Vendor Address

Vendor address to be used for this MSA

Field Name	Access	Description
Vendor Address to Use	Required	The vendor address to use for this transaction. By default, the vendor's primary address is used.
Alternate Vendor Address	Editable	The alternate address listed for this Vendor.
Address	Read-Only	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's

Field Name	Access	Description
		name.
City	Read-Only	City
State/Province	Read-Only	The state or province
State/Province - Other	Read-Only	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Country	Read-Only	Country
Zip/Postal Code	Read-Only	ZIP Code or postal code

MWBE Tracking

Track the Minority/Women-owned Business Enterprise (MWBE) participation on this MSA.

Field Name	Access	Description
Designations	Editable	Special designations applicable to this business
MWBE Contract Target %	Editable	The value of the Target for Minority-owned and Women-owned business enterprises (MWBE) for this contract
MWBE Contract Actual %	Editable	The actual MWBE percentage (MWBE Contract Actual Amount / Total Completed and Stored to Date)

(Internal) MSA Primary Contact

Specify the main internal contact for this MSA. By default, this is set to the record creator. Their contact information will be used to complete the remaining fields.

Field Name	Access	Description
Main Contact	Editable	Internal main contact for this contract
E-Mail	Read-Only	Main contact's email address
Mobile Phone	Read-Only	Main contact's mobile phone number
Work Phone	Read-Only	Main contact's work phone

Field Name	Access	Description
		number

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
MSA Shell Classification	Required	Specifies the shell classifications where this MSA can be used. For example, Production Projects can only use Production MSAs.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that this record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Additional Information

The MSA Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Master Service Agreements Date Picker UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Date Picker UDF 2	Disabled	Reserved for future use by your organization
Master Service Agreements Decimal UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Decimal UDF 2	Disabled	Reserved for future use by your organization
Master Service Agreements Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Master Service Agreements Currency Amount UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Master Service Agreements Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Master Service Agreements Picker UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The MSA Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Master Service Agreements Text 255 UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Text 255 UDF 2	Disabled	Reserved for future use by your organization
Master Service Agreements Text 255 UDF 3	Disabled	Reserved for future use by your organization
Master Service Agreements Text 255 UDF 4	Disabled	Reserved for future use by your organization
Master Service Agreements Long Text UDF 1	Disabled	Reserved for future use by your organization
Master Service Agreements Long Text UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Master Service Agreement line items can be consolidated from the following business processes: Master Service Agreement

Completing the Line Items tab

MSA Line Items

Cost for this MSA line item. This can be entered either as lump sum or unit rate.

Field Name	Access	Description
Item Quantity	Editable	Enter the item quantity.
Unit of Measure	Editable	Enter the Unit of Measure used for the Unit Quantity and Cost Per Unit amounts.

Field Name	Access	Description
Item Unit Cost	Editable	Enter the item unit cost.
Amount	Read-Only	Amount of this line item

Description

Enter additional information specific to this MSA line item.

Field Name	Access	Description
Short Description	Required	Enter a description of 250 characters or fewer.
Detailed Line Item Description	Editable	Enter additional detailed information about the line item description field.

Additional Information

The MSA Line Item Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
MSA Line Item UDF PD 1	Disabled	Reserved for future use by your organization
MSA Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization
MSA Line Item UDF CA 1	Disabled	Reserved for future use by your organization
MSA Line Item UDF DA 1	Disabled	Reserved for future use by your organization

Project Request Business Process

Use the Project Request business process to define basic project information and automatically create a project upon approval.

Characteristics

This is a Company-level business process with a workflow, provided in the system template.

Record Statuses

Approved	terminal status
Canceled	terminal status
Rejected	terminal status

Awaiting_Review	non-terminal status
Pending	non-terminal status
Pending_Approval	non-terminal status
Project_Creation	non-terminal status
Sent_for_Revision	non-terminal status

Workflow

The default workflow for the Project Request business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can take the action of approving or rejecting the record or send it on to others.

Related Processes

The Project Request business process might create the following business processes: BP Data Transfer (Note that BP Data Transfer will then automatically create Estimate and Project Closeout Checklist.)

The Project Request business process might be created by the following business processes: Not applicable

Creating a Project Request Record

Create a Project Request record by navigating to Company Logs / Project Request on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab. Act on an existing Project Request task that has been assigned to you from the Tasks log.

Complete the Project Request form and attach related documents, if needed. After completing the form, click Send and 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 the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Logs**, and then select **Project Request**.
3) On the Project Request 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Project Request.
    - If permitted, you can add users to the CC list. These users will receive a notification about this Project Request but are not assigned a task.

- If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.

7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Project Request Form

Key Information

Key Information about this Project Request

Field Name	Access	Description
Title	Required	Title of the record
Status	Read-Only	Status of the record
Project Number	Editable	Unique Project Number
Project Name	Editable	Name of the project
Building	Editable	Building for this Project Request
Location	Editable	Location of the project
Project Type	Editable	Type of project
Project Delivery Method	Editable	Project delivery method
Program	Editable	Number and name of the Program for a project

Description

Information relevant to this Project Request. Supplemental information can be added as an attachment.

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Assignments

Field Name	Access	Description
Project Sponsor	Editable	The sponsor of the project
Project Manager	Editable	Project Manager for this

Field Name	Access	Description
		project
Project Coordinator	Editable	The coordinator of the project
Finance and Legal Responsible Officer	Editable	The officer responsible for finance and legal

Dates

Specify the key dates for this project, if known.

Field Name	Access	Description
Requested Start Date	Disabled	The ideal date for starting the project
Requested Completion Date	Disabled	The ideal date for completing the project
Project Planned Start Date	Required	The planned start date for the project
Project Planned End Date	Editable	The planned end date for the project

Project Scope

Information on the scope of this project, including any measurement estimates

Field Name	Access	Description
Scope / Requirement Details	Editable	The project Request Scope or Requirements Details
Location GSF	Editable	The initial Gross Square Feet (GSF) at the location site
Location NASF	Editable	The initial Net Assignable Square Feet (NASF) of the building
New GSF	Editable	The new GSF generated at location site
New NASF	Editable	The new NASF of the building
Renovated GSF	Editable	The renovated built GSF
Renovated NASF	Editable	The renovated built NASF
Total Affected GSF	Read-Only	The total affected GSF. The

Field Name	Access	Description
		total GSF = New GSF + Renovated GSF
Total Affected NASF	Read-Only	The total affected NASF. The total NASF = New NASF + Renovated NASF

Financials

Financial-related information for the request

Field Name	Access	Description
Project Size Estimate	Editable	The estimated size of the project
Project Currency	Editable	Currency to be used as the project currency
Original Proposed Budget (Project Currency)	Editable	The Original Proposed Budget, in the Project Currency
Exchange Rate (Manual)	Editable	Manual exchange rate, for calculating the Original Proposed Budget in the Base Currency. 1.0 in the Base Currency should equal this amount in the project currency.
Original Proposed Budget (Base Currency)	Read-Only	The Original Proposed Budget, in the Base Currency
Cost Center	Editable	If applicable, the project cost center information
Funding Source(s)	Editable	Description of any other sources for funding this project. If available, include the fund numbers. **Note:** The approval of this Project Request does not guarantee that these funds will be allocated to the project.

Project Evaluation

Evaluation information about the proposed project

Field Name	Access	Description
Strategic Priority	Editable	The strategic priority
Evaluation Score	Editable	The score used when evaluating the project in portfolio management
Project Year	Editable	The starting year of the project
Deferred Maintenance	Editable	Deferred Maintenance contribution of this project
Overall Project Risk	Editable	Risk assessment used for the Capital Planning Process

Requester Information

If this request is on behalf of another person (that is, a non-user of this system), the requester details are shown below.

Field Name	Access	Description
User	Editable	Allows for selecting a Unifier Essentials user account
Department/Business Unit	Editable	Primary department/business unit
First Name	Editable	
Last Name	Editable	
E-Mail	Editable	
Title	Editable	
Work Phone	Editable	
Mobile Phone	Editable	

Project Shell Information

For administrative use only

Field Name	Access	Description
Shell location	Editable	
Status	Editable	
Shell Templates	Editable	
Project Administrator	Editable	Name of the project

Field Name	Access	Description
		administrator
Shell Classification	Editable	Indicates the project classification. Classifying the project helps ensure that irrelevant projects (such as Testing Project, Training Project, and so on) are not included in any future reporting.

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that this record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Project Additional Information

The Project Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Project Date Picker UDF 1	Disabled	Reserved for future use by your organization
Project Date Picker UDF 2	Disabled	Reserved for future use by your organization
Project Date Only Picker UDF 1	Disabled	Reserved for future use by your organization
Project Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
Project Decimal UDF 1	Disabled	Reserved for future use by your organization
Project Decimal UDF 2	Disabled	Reserved for future use by your organization

Field Name	Access	Description
Project Currency Amount UDF 1	Disabled	Reserved for future use by your organization
Project Currency Amount UDF 2	Disabled	Reserved for future use by your organization
Project Picker UDF 1	Disabled	Reserved for future use by your organization
Project Picker UDF 2	Disabled	Reserved for future use by your organization

Project Additional Notes

The Project Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
Project Text 255 UDF 1	Disabled	Reserved for future use by your organization
Project Text 255 UDF 2	Disabled	Reserved for future use by your organization
Project Text 255 UDF 3	Disabled	Reserved for future use by your organization
Project Text 255 UDF 4	Disabled	Reserved for future use by your organization
Project Long Text UDF 1	Disabled	Reserved for future use by your organization
Project Long Text UDF 2	Disabled	Reserved for future use by your organization

User Request Business Process

Use the User Request business process to track the requests to update, deactivate, or create users in the system.

Characteristics

This is a Company-level business process with a workflow, provided in the system template.

Record Statuses

Canceled	terminal status
Completed	terminal status

Pending	non-terminal status

Workflow

The default workflow for the User Request business process is set up in a certain way; however, it may be used differently by your organization. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval. The recipients in the second step can approve or reject the record or send it on to others.

Creating a User Request Record

Create a User Request record by navigating to Information / General / User Request on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab. Act on an existing User Request task that has been assigned to you from the Tasks log.

Complete the User Request form and attach related documents, if needed. After completing the form, click Send and 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 the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Logs**, and then select **User Request**.
3) On the User Request 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. Draft versions are stored under **Drafts**.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this **User Request.**
   - If permitted, you can add users to the CC list. These users will receive a notification about this User Request but are not assigned a task.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the User Request Form

Key Information

Field Name	Access	Description
User Request Type	Required	User request types include new, modify, or deactivate values.

Field Name	Access	Description
External User	Required	Indicates whether the vendor (user) is not a Unifier Essentials user. If the vendor (user) is not a Unifier Essentials user, the Vendor field becomes required.

Details

Field Name	Access	Description
Groups Membership	Required	The permissions are granted to users, or groups, to allow them access to system features.
Reason	Editable	The reason for the user request

User Information

Field Name	Access	Description
User	Editable	Allows for selecting a Unifier Essentials user account
First Name	Editable	The user's first name
Last Name	Editable	The user's last name
E-Mail	Editable	The user's email address
Title	Editable	The user's title
Work Phone	Editable	The user's work phone number
Mobile Phone	Editable	The user's mobile phone number
Vendor	Editable	The vendor for the contract

Additional Attributes

Field Name	Access	Description
Employee ID	Editable	The ID of the employee
Role	Editable	Role (ID and Name) for the timesheet

Field Name	Access	Description
Assigned Department	Editable	The assigned department
Manager	Editable	The manager of the person in the access request
Regular Hrs	Editable	Regular hours

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that this record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Additional Information

The User Request Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
User Request Date Picker UDF 1	Disabled	Reserved for future use by your organization
User Request Date Picker UDF 2	Disabled	Reserved for future use by your organization
User Request Decimal UDF 1	Disabled	Reserved for future use by your organization
User Request Decimal UDF 2	Disabled	Reserved for future use by your organization
User Request Date Only Picker UDF 1	Disabled	Reserved for future use by your organization

Field Name	Access	Description
User Request Date Only Picker UDF 2	Disabled	Reserved for future use by your organization
User Request Currency Amount UDF 1	Disabled	Reserved for future use by your organization
User Request Currency Amount UDF 2	Disabled	Reserved for future use by your organization
User Request Picker UDF 1	Disabled	Reserved for future use by your organization
User Request Picker UDF 2	Disabled	Reserved for future use by your organization

Additional Notes

The User Request Additional Notes block is reserved for future use by your organization.

Field Name	Access	Description
User Request Text 255 UDF 1	Disabled	Reserved for future use by your organization
User Request Text 255 UDF 2	Disabled	Reserved for future use by your organization
User Request Text 255 UDF 3	Disabled	Reserved for future use by your organization
User Request Text 255 UDF 4	Disabled	Reserved for future use by your organization
User Request Long Text UDF 1	Disabled	Reserved for future use by your organization
User Request Long Text UDF 2	Disabled	Reserved for future use by your organization

Vendor Business Process

Use the Vendor business process to create and manage the vendor directory, which might include General Contractors, Architects, Engineers, and so on. The Vendor records are used as pickers in many other business processes throughout the system.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Vendor Record

Create a Vendor record by navigating to Company Logs / Vendor on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Vendor form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Logs**, and then select **Vendor**.
3) On the Vendor page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Vendor Form

Key Information

Important information about this vendor

Field Name	Access	Description
Vendor Name	Required	This field is unique at the company level. The name or nickname for this vendor. This field must be unique to each vendor. This name will be the primary way this company is identified in the system.
Vendor ID	Editable	If Unifier Essentials is integrated with an external system, this field contains the ID that corresponds to the vendor in the external system. Populates based on the selected Vendor. If not integrated with an external system, leave

Field Name	Access	Description
		blank.
Primary Vendor Type	Editable	The primary vendor type for the vendor
Additional Vendor Type(s)	Editable	Any additional vendor types for this vendor
Primary Discipline	Editable	The vendor primary discipline, specialty, or area
Additional Discipline(s)	Editable	Vendor additional disciplines
Pre-qualified	Editable	Indicates whether the vendor is eligible to be included in the new bids
Status	Required	Record status
Vendor Shell Classification	Required	Indicates the projects where this Vendor can be used. Classifying the vendor ensures they are only used in projects of the same type, such as Production, Testing, Training, and so on.

Description

Enter a description of this vendor. Include any terms that might help users search for the vendor in the future.

Field Name	Access	Description
Vendor Tags / Keywords / Search Terms	Editable	Description about the vendor that can be used for searching or filtering. You can expand this field as needed.

Primary Address

Primary address of the vendor. This address might be used in formal documents, such as contracts or change orders. It will also be used as the default address for any contacts added to the Additional Contacts tab. Additional addresses for this vendor should be added to the Additional Addresses tab.

Field Name	Access	Description
Address	Required	The street address, P.O.

Field Name	Access	Description
		box, apartment, suite, unit, building, floor, and so on. Do not include the contact name.
City	Required	City
Country	Required	Country
State/Province	Required	The state or province
Zip/Postal Code	Required	ZIP Code or postal code
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Phone	Editable	Phone number
Fax	Editable	Fax number
Email	Editable	Email address
Vendor website	Editable	The URL to the vendor website

Primary Contact

Primary contact for this vendor. Additional contacts can be added to the Additional Contacts tab.

Field Name	Access	Description
Vendor Contact First Name	Editable	First name of the main vendor contact
Vendor Contact Last Name	Editable	Last name of the main vendor contact
Vendor Contact Phone	Editable	Phone number of the main vendor contact
Vendor Contact Email	Editable	Contact email address for the vendor

Primary Insurance

Provide information about the vendor's insurance, and attach any relevant documents to this record. For information about multiple insurance policies, use the Additional Insurance tab.

Field Name	Access	Description
Insurance Provider	Editable	Insurance provider of the primary insurance

Field Name	Access	Description
Policy Expiration Date	Editable	Expiration date for the primary insurance
Policy Number	Editable	Insurance policy number
Indemnification Amount	Editable	Indemnification amount of the primary insurance

Vendor Identification

Provide information to identify the vendor more extensively (optional). This information might be used for reports, printouts, and integrations.

Field Name	Access	Description
Legal Vendor Name	Editable	The full legal business name for the vendor, if it is different from the vendor name. The name might be useful for vendors with a name longer than 50 characters. The system uses the name on any formal custom prints of records.
Tax ID	Editable	Tax ID of the vendor
Employer Identification Number (EIN)	Editable	The Employer Identification Number (EIN) is also known as the Federal Tax Identification Number, and it is used to identify a business entity.
DUNS Number	Editable	The Dun & Bradstreet DUNS Number is a unique nine-digit identifier for businesses.
Reference ID	Editable	Reference ID of the vendor
License No	Editable	License number of this vendor
Business Structure	Editable	The vendor business structure
Parent Vendor	Editable	If applicable, the name of vendor parent company

Unifier User

Use this block to specify whether this Vendor is a user of the system.

Field Name	Access	Description
Vendor a Unifier User?	Required	Indicates whether or not the vendor should be CCed when the contract is approved. CCing the vendor allows the vendor to see the contract, with some restrictions, as well as to access the contract when creating Change Orders, Payment Applications, or other business processes.
Vendor User	Editable	Indicates whether the vendor is a user in the system
Vendor User Email	Read-Only	Email address of the vendor user, if the person is a user in the system

Business Classification and Designations

Business Classification and Designations for this vendor. If you must add designations that are not listed, contact your administrator.

Field Name	Access	Description
Designations	Editable	Special designations applicable to this business
Certificate Number(s)	Editable	The certificate numbers for the designations of this vendor
Expiration Date	Editable	The earliest expiration date of the vendor certificates. The date might be used for notification

Remarks

Add any additional remarks, comments, or observations that you want to store about this vendor. You can also use comments to track this information.

Field Name	Access	Description
Remarks	Editable	Any additional comments about this vendor

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

Logo

Vendor's logo image, which can be pulled on to prints and reports if desired.

Field Name	Access	Description
Logo Image	Editable	The vendor business logo

Location/Mapping

Used for viewing vendors on a map by primary address.

Field Name	Access	Description
Latitude	Editable	The latitude of an area
Longitude	Editable	The longitude of an area
Address Code	Read-Only	

Electronic Bidding Information

The information below is used in the bidding module.

Field Name	Access	Description
Contact Company	Read-Only	
Bidder First Name	Editable	First name of the primary contact for bidding
Bidder Last Name	Editable	Last name of the primary contact for bidding
Bidder Email	Editable	Email address of the bidder. This will be used when inviting this Vendor to bids.
Contact Language	Editable	

Field Name	Access	Description
Date Format	Editable	
Time Zone	Editable	

Custom Fields

The Vendor Custom Fields block is reserved for future use for your organization.

Field Name	Access	Description
Vendors Text 255 UDF 1	Disabled	Reserved for future use by your organization
Vendors Text 255 UDF 2	Disabled	Reserved for future use by your organization
Vendors Text 255 UDF 3	Disabled	Reserved for future use by your organization
Vendors Picker UDF 1	Disabled	Reserved for future use by your organization
Vendors Picker UDF 2	Disabled	Reserved for future use by your organization

Consolidating Line Items

Vendor line items can be consolidated from the following business processes: Vendors

Completing the Additional Addresses tab

Additional Addresses

Use this form to add additional addresses for this vendor.

Field Name	Access	Description
Address Type	Required	The address classification for additional vendor addresses
Site Name	Required	Name for this additional address
Address	Required	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact name.
City	Required	City
Country	Required	Country

Field Name	Access	Description
State/Province	Required	The state or province
Zip/Postal Code	Required	ZIP Code or postal code
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.
Phone	Editable	Phone number
Fax	Editable	Fax number
Email	Editable	Email address

Line Item Information

Field Name	Access	Description
Line Item Status	Required	Select the applicable status. **In Review** is selected by default.

Additional Information

The Vendor Additional Addresses Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Vendor Address UDF 1	Disabled	Reserved for future use by your organization
Vendor Address UDF 2	Disabled	Reserved for future use by your organization

Completing the Additional Contacts tab

Key Information

Field Name	Access	Description
Vendor Contact First Name	Required	First name of the main vendor contact
Vendor Contact Last Name	Required	Last name of the main vendor contact
Line Item Status	Editable	Select the applicable status. **In Review** is selected by

Field Name	Access	Description
		default.

Contact Information

Field Name	Access	Description
Title	Editable	Title of the record
Email	Editable	Email address
Work Phone	Editable	
Mobile Phone	Editable	
Home Phone	Editable	

Address

Field Name	Access	Description
Address	Editable	The street address, P.O. box, apartment, suite, unit, building, floor, and so on. Do not include the contact's name.
City	Editable	City
Country	Editable	Country
State/Province	Editable	The state or province
Zip/Postal Code	Editable	ZIP Code or postal code
State/Province - Other	Editable	If selecting a country without defined states, provinces, or regions, this field provides additional information.

Additional Information

The Vendor Additional Contacts Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Vendor Contact UDF 1	Disabled	Reserved for future use by your organization
Vendor Contact UDF 2	Disabled	Reserved for future use by your organization

Completing the Additional Insurance tab

Key Information

Additional insurance details below. Attach related documentation related to each item.

Field Name	Access	Description
Insurance Provider	Required	The insurance provider of the primary insurance
Policy Number	Required	The insurance policy number
Policy Effective Date	Editable	The effective date of the policy for the primary insurance
Policy Expiration Date	Editable	The expiration date for the primary insurance
Indemnification Amount	Editable	The indemnification amount of the primary insurance
Policy Type	Editable	The insurance policy type

Remarks

Insurance-specific notes

Field Name	Access	Description
Remarks	Editable	Any additional comments about this vendor

Line Item Information

Field Name	Access	Description
Line Item Status	Editable	Select the applicable status. **Active** is selected by default.

Company Lists and Pickers

Folder Template Business Process

Use the Folder Template business process to define folder templates for use in the Project Configuration business process within each project. Create different Folder Template records to allow different projects to save documents attached to business processes to different folders in that project's document manager.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Folder Template Record

Create a Folder Template record by navigating to Information / General / Folder Template on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Folder Template form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

Note:

- You must enter a value in all required fields (*) before you can save the form.
- You cannot use special characters / \ : * ? " < > | when naming a folder or publish path.

1) Go to the Company Workspace tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Folder Template**.
3) On the Folder Template page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Folder Template Form

Record Information

Field Name	Access	Description
Title	Required	Enter a title.
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated
Status	Required	Status of the project

Field Name	Access	Description
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

DM Publishing Defaults

These defaults control to which folder each business process publishes documents.

Field Name	Access	Description
Default Action Items Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Action Items form
Default Actuals Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Actuals form
Default Architect Supplemental Instruction Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Architect Supplemental Instruction form
Default Budget Change Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Budget Change form
Default Budget Transfer Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Budget Transfer form
Default Change Directive Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Change Directive form
Default Change Order Publish Path	Editable	The location of the folder in Document Manager that includes the attached

Field Name	Access	Description
		documents for the Change Order form
Default Change Request Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Change Request form
Default Closeout Cklist Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Closeout Checklist form
Default Communications Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Communications form
Default Contract Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Contract form
Default Daily Reports Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Daily Reports form
Default Document Approval Publish Path	Editable	Specifies the folder where documents attached to the Document Approval form will be stored in the Document Manager
Default Estimate Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Estimate form
Default Field Observation Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Field Observation form

Field Name	Access	Description
Default Forecast Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Forecast form
Default Fund Appropriations Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Fund Appropriations form
Default Incident Management Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Incident Management form
Default Initial Budget Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Initial Budget form
Default Invoice Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Invoice form
Default Issues Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Issues form
Default Journal Entry Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Master Areas form
Default Lessons Learned Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Lessons Learned form
Default Meeting Minutes Publish Path	Editable	The location of the folder in Document Manager that

Field Name	Access	Description
		includes the attached documents for the Meeting Minutes form
Default Miscellaneous Cost Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Miscellaneous Cost form
Default Notice to Proceed Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Notice to Proceed form
Default Owner Walk Through Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Owner Walk Through form
Default Payment Application Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Payment Application form
Default PO Amendment Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Purchase Order Amendment
Default Project Note Publish Path	Editable	Specifies the folder where documents attached to Project Notes will be stored in the Document Manager
Default Project Status Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Project Status form
Default Project Timesheet Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Project Timesheet form

Field Name	Access	Description
Default Punch List Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Punch List form
Default Purchase Orders Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Purchase Order form
Default Request for Bid Publish Path	Editable	Specifies the folder where documents attached to the Request for Bid form will be stored in the Document Manager
Default Request for Information Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Request for Information form
Default Risks Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Risks form
Default Submittals Item Publish Path	Editable	Specifies the folder where documents attached to the Submittal Item form will be stored in the Document Manager
Default Submittal Pkg Publish Path	Editable	Specifies the folder where documents attached to the Submittal Package form will be stored in the Document Manager
Default Warranty Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Warranty form
Default Work Release Publish Path	Editable	The location of the folder in Document Manager that

Field Name	Access	Description
		includes the attached documents for the Work Release form

Master Area Template Business Process

Use the Master Area Template to define lists of areas that can be selected from within business processes in a project (examples: Request for Information, Incident Management, and so on). Create multiple Master Area Template records to allow different projects to use different lists or manage a single Master Area Template containing all areas within your portfolio.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Master Area Template Record

Create a Master Area Template record by navigating to Information / General / Master Area Template on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Master Area Template form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Master Area Template**.
3) On the Master Area Template page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Master Area Template Form

General

Field Name	Access	Description
Title	Editable	Enter a title.
Status	Required	Select a status.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Number	Read-Only	This field displays the record number.
Line Item Count	Read-Only	The number of line items
Record Last Update Date	Read-Only	Date that the record was last updated

Completing the Area List tab

Area Details

Physical breakdown of the Area location

Field Name	Access	Description
Discrete Area Name	Required	The specific Area to be referenced
Tier 1 - Area Group Reference	Editable	Tier 1 of the area location
Tier 2 - Area Group Reference	Editable	Tier 2 of the area location
Tier 3 - Area Group Reference	Editable	Tier 3 of the area location
Tier 4 - Area Group Reference	Editable	Tier 4 of the area location
Tier 5 - Area Group Reference	Editable	Tier 5 of the area location
Line Item Status	Editable	Select the line item status. **Active** is selected by default.

Description

Detailed description of the physical area for this item

Field Name	Access	Description
Detailed Description	Editable	The detailed information about the short-description

Field Name	Access	Description
		field. The field size can be expanded.

Location

Adding a latitude and longitude to areas will help with the mapping of records.

Field Name	Access	Description
Latitude	Editable	Enter a latitude.
Longitude	Editable	Enter a longitude.

Report Configuration Business Process

Use the Report Configuration business process to store different report settings. This lets users create report/custom print layouts for different business units, store banners, and so on.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Report Configuration Record

Create a Report Configuration record by navigating to Company Lists and Pickers / Report Configuration on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Report Configuration form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Report Configuration**.
3) On the Report Configuration page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.

5) After completing the form, click **Submit**.

Completing the Report Configuration Form

Key Information

Key information about this Report Configuration

Field Name	Access	Description
Title	Editable	Enter a title.
Status	Required	Select a status.
Default Configuration	Editable	Use this field to select a default configuration when the project-specific configuration is not available or cannot be found.
Record Number	Read-Only	System-assigned record number
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Creator	Read-Only	Creator of this record

Owner Information

Used to specify how your organization should be represented if different from the primary company name.

Field Name	Access	Description
Company	Editable	Enter the company name if different from the primary company.
Owner Address	Editable	Full Address to be used on custom prints as the Owner Address. This is useful when different projects will have different owner addresses. If left blank, the Company address will be used instead.

Header Colors

Color and image settings for the report header. Note that colors are listed as six-digit, hexadecimal color codes.

Field Name	Access	Description
Report Header Text	Editable	The report page header content font color
Report Header Line	Editable	The report page header line color (button)
Header Image (400px x 100px)	Editable	The image to be used in the header. For best results, make the Width equal to 400 pixels and the Height equal to 100 pixels.

Headings

Color settings for Word Heading formatting.

Field Name	Access	Description
Heading 1 Color	Editable	Font color for Microsoft Word Heading 1
Heading 2 Color	Editable	Font color for Microsoft Word Heading 2

Indicator Colors

Color settings for indicators (red / amber / green)

Field Name	Access	Description
Red	Editable	Danger indicator
Amber	Editable	Warning indicator
Green	Editable	All-clear indicator

Table Colors

Colors used in tables

Field Name	Access	Description
Table Header Row Background	Editable	The report table header row background color
Table Header Row Font Color	Editable	The report table header row content font color
Table Row Shading (Odd Rows)	Editable	The table row shading for odd-numbered rows

Field Name	Access	Description
Table Row Shading (Even Rows)	Editable	The table row shading for even-numbered rows
Table Footer Row Background	Editable	The report table footer row background color
Table Footer Row Font Color	Editable	The report table footer row content font color

Chart Colors

Specify the chart colors to be used in charts, graphs, and so on.

Field Name	Access	Description
Chart Color 1	Editable	Generated charts or graphs: Chart Color 1
Chart Color 2	Editable	Generated charts or graphs: Chart Color 2
Chart Color 3	Editable	Generated charts or graphs: Chart Color 3
Chart Color 4	Editable	Generated charts or graphs: Chart Color 4
Chart Color 5	Editable	Generated charts or graphs: Chart Color 5
Chart Color 6	Editable	Generated charts or graphs: Chart Color 6
Chart Color 7	Editable	Generated charts or graphs: Chart Color 7
Chart Color 8	Editable	Generated charts or graphs: Chart Color 8
Chart Color 9	Editable	Generated charts or graphs: Chart Color 9
Chart Color 10	Editable	Generated charts or graphs: Chart Color 10

Role Business Process

Use the Role business process to manage roles and rates, which are then used in the Timesheet business process.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Role Record

Create a Role record by navigating to Company Lists and Pickers / Role on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Role form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Role**.
3) On the Role page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Role Form

Key Information

Key Information about this Role record

Field Name	Access	Description
Role Name	Required	
Role ID	Required	
Effective From	Required	Date when the rate is available
Effective To	Required	Date when the rate is no longer available
Standard Rate	Required	Standard rate for the Role
Overtime Rate	Editable	Overtime rate for the Role

Field Name	Access	Description
Transaction Currency	Required	If there are multiple currencies defined, use this field to specify a currency other than the project currency.
Status	Required	

Description

Description of the Role

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Last Update Date	Read-Only	Date that the record was last updated

Specification Section Template Business Process

Use the Specification Section Template business process to define lists of Spec Sections that can be selected from within business processes in a project (for example, Request for Information, Submittal Items, and so on). Create multiple Specification Section Template records to allow different projects to use different lists or manage a single Specification Section Template containing a list to be used across all your projects.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Specification Section Template Record

Create a Specification Section Template record by navigating to Company Lists and Pickers / Specification Section Template on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Specification Section Template form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Specification Section Template**.
3) On the Specification Section Template page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Submit**.

Completing the Specification Section Template

General

Field Name	Access	Description
Title	Editable	Enter a title.
Status	Required	Select a status.
Creator	Read-Only	Creator of this record
Creation Date	Read-Only	Date that the record was created
Record Number	Read-Only	This field displays the record number.
Line Item Count	Read-Only	The number of line items
Record Last Update Date	Read-Only	Date that the record was last updated

Completing the Specifications List tab

Specification Section Details

Details about the Spec Section Item

Field Name	Access	Description
Specification Division and Group	Required	The lowest specification (Tier Code) and description that is selected at the project/shell level, for reference
Tier 1 - Specification Division Reference	Editable	The division reference that is used for grouping reports purposes. Example: 01 - General Requirements
Tier 2 - Specification Group Reference	Editable	The division reference that is used for grouping reports purposes. Example: 01 33 - Submittal Procedures
Tier 3 - Specification Group Reference	Editable	The division reference that is used for grouping reports purposes. Example: 01 33 19 - Field Test Reporting
Tier 4 - Specification Group Reference	Editable	The division reference that is used for grouping reports purposes. Example: 01 33 29.04 - Material Content Form
Tier 5 - Specification Group Reference	Editable	The division reference that is used for grouping reports purposes. Example: 01 33 29.04 XX - XXXXXX
Line Item Status	Editable	Select the line item status. **Active** is selected by default.

Description

Description of this Specification Section.

Field Name	Access	Description
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Additional Information

The Specification Section Line Item Additional Information block is reserved for future use by your organization.

Field Name	Access	Description
Specification Section Line Item UDF PD 1	Disabled	Reserved for future use by your organization
Specification Section Line Item UDF Text 255 1	Disabled	Reserved for future use by your organization

Standard Issues Business Process

Use the Standard Issues business process to create a list of common (standard) issues that are seen on projects of the type that an owner manages. This list is created at the company level and then becomes available on the Owner Walk Through and Punch List Item business processes.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Creating a Standard Issue Record

Create a Standard Issues record by navigating to Company Lists and Pickers / Standard Issues on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Standard Issues form and attach related documents, if needed. After completing the form, click Save to create a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **Company Lists and Pickers**, and then select **Standard Issues**.
3) On the Standard Issues page, click **Create**. Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.

5) After completing the form, click **Submit**.

Completing the Standard Issues Form

Key Information

Key information related to the Standard Issue or Defect.

Field Name	Access	Description
Title	Required	Enter a title.
Master Section	Required	Indicates the category of the defect (main section)

Description

The descriptions entered here are automatically added to Punch List Items when this Standard Issue is selected.

Field Name	Access	Description
Standard Issue	Editable	The field that will be used for searching in other forms
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Required	Status of the project

Information

Company Configuration Business Process

Use the Company Configuration business process to configure default values for company-level business processes. Updating default settings will only update new records and will not affect existing records.

Characteristics

This is a Company-level business process without a workflow, provided in the system template.

Record Statuses

Active	non-terminal status
Inactive	non-terminal status

Updating a Company Configuration Record

Update a Company Configuration record by navigating to Information / General / Company Configuration on the Company Workspace tab, or from the Tasks log on the Company Workspace or Home tab.

Complete the Company Configuration form and attach related documents, if needed. After updating the form, click Save to update a record and keep it in editable mode, or click Submit if you are done and ready to commit the record.

> **Note:** You must enter a value in all required fields (*) before you can save the form.

1) Go to the **Company Workspace** tab and switch to **User** mode.
2) In the left Navigator, select **General**.
3) In the **General** log, open **Company Configuration**.
4) Click **Edit**. Refer to the tables below to update the form. You can click **Save** at any time to update a record and keep it in editable mode.
5) To add attachments, click **Attach Files** on the **Attachments** tab.
6) After completing the form, click **Submit**.

Completing the Company Configuration Form

General Settings

Select the templates to use at the company level.

Field Name	Access	Description
Form Configuration	Editable	This field controls which Dynamic Data Set (DDS)

Field Name	Access	Description
		will be used for the forms at the company level. The DDSs are used to control the behavior (editable, required, or disabled) on specific fields.

Master Areas

Field Name	Access	Description
Default Master Areas Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Master Area form

Actuals Importer

Field Name	Access	Description
Default Actuals Importer Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Actuals Importer form
Actuals Importer - Use Acknowledge Step	Editable	If selected, the system routes the Actuals Importer workflow to an acknowledge step, upon approval, instead of sending the workflow directly to the end step.
Actuals Importer L1 Minimum Approval Threshold	Editable	The Actuals Importer minimum dollar threshold for Level 1 approval
Actuals Importer L2 Minimum Approval Threshold	Editable	The Actuals Importer minimum dollar threshold for Level 2 approval
Actuals Importer L3 Minimum Approval Threshold	Editable	The Actuals Importer minimum dollar threshold for Level 3 approval

Master Service Agreements

Field Name	Access	Description
Default MSA Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Master Service Agreement (MSA)

Field Name	Access	Description
		form

Project Requests

Field Name	Access	Description
Default Project Request Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Project Request form
Project Administrator	Editable	Default Administrator for new projects created via the Project Request process
Project Units to Use	Editable	Defines which measure will be used to determine the project units

Roles

Field Name	Access	Description
Default Role Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Role form

Specification Section Template

Field Name	Access	Description
Default Spec Section Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Spec Section form

Standard Issues

Field Name	Access	Description
Default Standard Issues Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Standard Issues form

Timesheets

Field Name	Access	Description
Default Timesheet Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Timesheet form

User Requests

Field Name	Access	Description
Default User Request Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the User Request form

Vendors

Field Name	Access	Description
Default Vendor Publish Path	Editable	The location of the folder in Document Manager that includes the attached documents for the Vendor Publish form
Vendor a Unifier User by Default?	Required	Indicates whether new Vendors should default to having a Unifier Essentials user associated to them

Record Information

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Status	Required	Status of the project
Record Last Update Date	Read-Only	Date that the record was last updated

Report Section Business Processes

This section outlines the Business Processes available in the Report section at the organizational and project levels.

In This Section

Report Utility Business Process

Use the Report Utility business process to run custom reports in the background, schedule reports to be run at a specific frequency, or call reports via Representational State Transfer (REST) Application Program Interface (API).

Characteristics

This is an Project-level business process with a workflow, provided in the system template.

Record Statuses

Completed	terminal status
Awaiting_Start	non-terminal status

Workflow

The default workflow for the Report Utility business process is set up in a certain way; however, your organization might use it differently. Typically, a user with the necessary permissions can create the record and either move it directly to the end step or send it to others for review or approval.

Related Processes

The Report Utility business process might create the following business processes: Not applicable

The Report Utility business process might be created by the following business processes: Not applicable

Creating a Report Utility Record

Reports you can see and want to run are defined by what has been set up for you by your Company Administrator. You will see a workflow for the specific reports you can run. There are currently two out of the box (OOTB): Project Details and Project Summary. Create a Report Utility record by navigating to Reports / Report Utility on the Project/Shell tab, or from the Tasks log on the Home tab or relevant Project/Shell tab. Act on an existing Report Utility task that has been assigned to you from the Tasks log.

Complete the Report Utility form and attach related documents, if needed. After completing the form, click Send and 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 tab and switch to **User** mode.
2) In the left Navigator, select **Reports**, and then select **Report Utility**.
3) On the Report Utility page, click **Create.** Refer to the tables below to complete the form. You can click **Save** at any time to create a record and keep it in editable mode.
4) To add attachments, click **Attach Files** on the **Attachments** tab.
5) After completing the form, click **Send**.
6) On the **Workflow Action Details** tab, select who should receive this Report Utility.
   - If permitted, you can add users to the CC list. These users will receive a notification about this Report Utility but are not assigned a task. The notification will include the custom print as an attachment.
   - If permitted, you can adjust task due dates for all users, or set individual task due dates for each assignee.
7) Click **Send**.
8) In the **Notification** window, review the content and click **OK**.

   The record moves to the next step in the workflow.

Completing the Report Utility Form

Key Information

Field Name	Access	Description
Title	Required	Enter a title for this record.
Report Name	Required	Select a name from the list. If Report Name is not available, contact your Company Administrator.

Description

Field Name	Access	Description
Short Description	Editable	Enter a description of 250 characters or fewer.
Detailed Description	Editable	The detailed information about the short-description field. The field size can be expanded.

Saved Report Location

Field Name	Access	Description
Save Path Source	Editable	Accept the default settings or select **Override**.
Manual Report Location		If you selected **Override**, enter the new location in the Document Manager. Make sure that the path begins with a forward slash (/) but does not end with one.
Report Location	Read-Only	Displays the location in which the report will be stored.

Record Information

System information about this record

Field Name	Access	Description
Record Number	Read-Only	System-assigned record number
Creator	Read-Only	Creator of this record
Record Last Update Date	Read-Only	Date that the record was last updated
Creation Date	Read-Only	Date that the record was created
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions
Status	Read-Only	Record status for a workflow BP record is based on the workflow action preceding the current workflow step.

Completing the Deliver To tab

General

Field Name	Access	Description
User	Required	Select the applicable Unifier Essentials user either by typing characters in the text box or click the **Select** icon.

Field Name	Access	Description
		You can add multiple recipients.
E-Mail	Read-Only	Displays the email address for the selected user.

Completing the Parameters tab

Field Name	Access	Description
Search Parameter	Required	Select the applicable parameter from the list. You can add multiple parameters.
Value	Required	Enter 4000 or fewer characters.

Reporting

The system includes predefined reports and lets you create your own reports. (The reports that you can create or have access to varies based on user-level permissions.) Different reports support views of information at different levels and to serve different purposes.

- Custom Reports—Organization Level
  - Cash Flow History
  - Cash Flow Roll-Up
  - Cost Sheet Summary
  - Open / Overdue Tasks Summary
  - Project Comparison
  - Project Details
  - Project Phase Summary
  - Project Schedule Summary
  - Project Summary
  - Project Summary (Excel)
  - RFI Log
  - Schedule Lookahead
  - Text Search
  - Administrative
    - BP Documentation
    - Usage Analysis
    - User Group Membership
- Custom Reports—Program Level
  - Program Cost Sheet
  - Program Project Summary
- Custom Reports—Region, Site, and Building Level
  - Cash Flow History
  - Cash Flow Roll-Up
  - Cost Sheet Summary
  - Open / Overdue Tasks Summary
  - Project Comparison
  - Project Details
  - Project Phase Summary
  - Project Schedule Summary
  - Project Summary
  - Project Summary Excel

- RFI Log
- Schedule Comparison
- Schedule Lookahead
- Text Search
- Administrative
  - Usage Analysis
- Custom Reports—Project Level
  - Cash Flow History
  - Cash Flow Report
  - Commitment Summary
  - Open / Overdue Tasks
  - Project Cost Report
  - Project Details
  - RFI Log
  - Schedule Comparison
  - Schedule Lookahead
  - Schedule Report
  - Text Search
  - Administrative
    - Business Process Access Control
    - Business Process Permissions
    - Usage Analysis
    - User Group Membership
    - Workflow Setup Documentation

In This Section

Project Level User Defined Reports

A user-defined report (UDR) is a customizable report that can be run at the project/shell, program, and company level (**User** mode). The information that can be included in a UDR can include:

- Any business process data element (that is, fields found on the business process form)
- Business process workflow information
- System data elements, including company, project/shell, and user information
- Column headings from cost and funding sheets
- Cost sheet and work package data elements

- Shell P6 Summary

  The data source for creating a report using the Shell P6 Summary data type are: P6 Summary and Spread.
- Data views in published status

You can define as many different reports as you need and save them for other users to access and run.

User-defined reports are defined the same way for the project/shell, program, and company level. Only the query fields will vary from report to report.

You can run reports on cash flow curve values in either transaction or project currencies. The UDR will show the values in the chosen currency, and it will display the exchange rate used for the conversion between the transaction and project currency.

You can also run Snapshot reports in both currencies. All changes done in the UDR will be supported for Snapshot reports.

Custom Prints

Custom Format Print Window for a non-Workflow BP

The Custom Format Print window, for a *non-Workflow* BP, has two sections:

- Select a custom print template
- Select a template and format to print

Both sections facilitate custom print template and format selections.

Select a custom print template

Lists all the custom print templates existing for the non-workflow BP, including the custom print templates created in the **Custom Templates** node and the custom print templates created in the configuration of the non-workflow BP. For example, the list may include Oracle Analytics Server custom print templates, Word, and PDF custom print templates.

If there are multiple custom print templates for the same non-workflow BP, all the published templates are listed in this section.

The "Select a template and format to print" is populated by the selection made in the "Select a custom print template" section.

Select a template and format to print

- If you select an Oracle Analytics Server custom print, you can select the desired template and format from the drop-down lists.
- Template drop-down displays all the available templates for the selected format.
- Format drop-down displays the available formats for the selected template.
- If the custom print template was created using PDF or Word, "Select a template and format to print" is disabled.

Default template and format (non-Workflow)

- If an Oracle Analytics Server print template is selected, the default values in the drop-down lists are set based on the default in the custom print template.
- When an Oracle Analytics Server print template is selected in the "Select a custom print template" section, the template and format are populated based on the default value selected at the time of designing the print template.

Custom Format Print Window for a Workflow BP

If there is only one custom print template, and it happens to be an Oracle Analytics Server template, the print template is selected in the “Select a custom print template” section, and the template and format are populated based on the default value selected at the time of designing the print template.

The Custom Format Print window has three sections for a Workflow BP.

- Select a custom print template
- Select a template and format to print
- Select options for Workflow Progress

By default, when the Custom Format Print window is launched, all three sections are enabled and the first template is selected. The options seen in the subsequent sections are based on the selection made in the "Select a custom print template" section.

You can select options for workflow progress in the 'Select options for Workflow Progress' section of the Custom Format Print window for PDF and Word templates, which are created at the time of configuring the non-workflow BP.

If the selected custom print template is of an Oracle Analytics Server type, the “Select options for Workflow Progress” section is disabled. This is because the custom print template designers can always use the system provided Workflow views to include workflow-related information in the template.

Default template and format (Workflow)

- When an Oracle Analytics Server print template is selected in the "Select a custom print template" section, the "Select a template and format to print" section is populated based on the default value selected at the time of designing the print template.
- If there is only one custom print template, and it is an Oracle Analytics Server template, the print template is selected in the “Select a custom print template” section, and the template and format is populated based on the default value selected at the time of designing the print template.

> **Note**: If you custom print a draft business process record, the modified record values will not be displayed in the Output of the Oracle Analytics Server print.

Custom Format Print Window for Shells

In addition to editing shells that you have permissions for, you can view all Custom Print Templates and define them at the shell level. After you navigate to your system logs, you must select a BP. After you choose an item from the list of available items in the BP, click the **Settings** icon and select the **Print - Custom** option.

When you select **Print - Custom**, a new window is displayed where you can choose a Custom Print Template from the list. Upon choosing one of the available Custom Print Templates, select **Print**.

Generating Custom Reports using the Report Utility BP

Custom reports cannot be scheduled and distributed to users like UDRs can be. Running a custom report must be done manually by a user. Large reports need to be initiated by a user and then may run for a long period of time. To avoid these challenges for the user and to take advantage of the custom print auto-generation capability, the Company Administrator can use the Report Utility BP to set up a template of a custom report using an existing custom report data model. This facilitates the automatic generation of custom prints of BP records when a BP record is saved or reaches a step in a workflow. If your administrator has implemented this feature, you can:

- ***Create a Report Utility BP record***.
- ***Use the Report Utility BP Templates to schedule custom print generation***.

Creating a Report Utility BP Record

1) Create a record:
   a. Go to the shell tab and switch to **User** mode.
   b. In the left Navigator, select **Reports**, and then select **Report Utility**.
   c. On the **Report Utility** page, click **Create**.
   d. Select the workflow from the workflow setups that you have access to use.
2) On the **Report Utility** tab of the Main form:
   a. Enter a **Title** and select the **Report Name**.

      If Report Name is not available, contact your Company Administrator; for more information, see the information regarding **UE rep_Report_SPD** described in **Updating the Data Structure Setup** topic in the *Unifier Essentials General Administration Guide*.
   b. Add the optional **Short Description** and **Detailed Description**.
   c. Accept the default settings or override and update the **Saved Report Location** to specify where the print will auto-publish in the Document Manager.
3) On the **Deliver To** tab, add the user(s) that should receive the custom print attached to a workflow notification email.
4) On the **Parameters** tab, add the **Search Parameter** for the report selected on the Main form.

   You can add multiple Search Parameters.
5) Send the record to the End step of the workflow.

Using Report Utility BP Templates to Schedule Custom Print Generation

1) Go to the shell tab and switch to **User** mode.

2) In the left Navigator, select **Reports**, and then select **Report Utility**.
3) On the **Report Utility** page, click **Actions**, and then select **Create From Template**.
4) Open and update an existing template or click **Create** to create a new one
5) On the **General** tab, enter a **Name** and optional **Description**, and select the **Workflow** for the record.

   The workflow selected will identify which print will be created.
6) On the **Schedule** tab, select the **Enable scheduled record creation** checkbox, and set up the **Frequency** and **Range of Recurrence** for record creation and custom-print generation.
7) If you are creating a new template, click **Create**; otherwise, click **Save**.

Generic Cost Business Processes

The system contains five Generic Cost business processes (BPs) that are primarily intended for use as integration sources or destinations for use with enterprise resource planning (ERP) software or other financial systems. You can use the BPs for other purposes as well. Three-level guided workflows are provided for all Generic Cost BPs; Generic Cost 1 also provides a 10-level guided workflow.

While the BPs are available for use, they are not currently configured for use or included in the shell templates. Your administrator can set up these BPs for use in your environment. For more information, see ***Implementing New Features and Updates after a Configuration Package is Deployed in Unifier Essentials https://docs.oracle.com/cd/F46346_01/English/admin/general_admin/10301788.htm***.

Use the Generic Cost 1 through 5 BPs for requirements not met by other BPs.

Access Other Smart Construction Platform Applications

The Oracle Construction and Engineering applications that are included in the Smart Construction Platform are accessible from the product banner so that you can access your projects across all your applications with ease.

To access the **Smart Construction Application** panel, in the application banner, select **Switch Applications**.

The content that displays in the panel depends on what other applications and projects you have access to.

- **Applications for Current Project**: Lists all the applications that have a link to the project that you currently have open and have access to.
- **Other Available Applications**: Lists all the other applications that you have access to.

If you do not have access to any other applications, you are presented with more information about the applications that you could be using.

To open the **Oracle Construction and Engineering Lobby**, select **View all Projects**.

FAQs

What is the Smart Construction Platform?

Watch this brief ***Smart Construction Platform Overview video.*** (***https://players.brightcove.net/2985902027001/default_default/index.html?videoId=6300994864001***)

I have access to the same project in multiple products, but I don't see a link to that project in the application switcher. Why not?

A link for the project between the multiple applications must be created in the Construction and Engineering Lobby by a Lobby administrator.

Learn more in the ***Construction and Engineering Lobby Help*** (***https://docs.oracle.com/cd/F23711_01/help/en/202246.htm***).

Why do I see the same application listed in both my Applications for Current Project list and my Other Available Applications list?

You have access to the same application but in different instances of that application. For example, one instance may be hosted on a US data center and another may be hosted on an Australian data center.

I have access to other Oracle Construction and Engineering applications. Why don't I see them here?

Only applications included in the Smart Construction Platform are available through the Switch Applications panel.

To learn more about the Smart Construction Platform applications, visit us on ***Oracle Help Center*** (***https://docs.oracle.com/en/industries/construction-engineering/index.html***).