Oracle

Primavera Unifier

Accelerator User Guide

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Oracle Primavera Unifier Accelerator User Guide

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Contents

Introduction

The Primavera Unifier base configuration, Unifier Accelerator, includes more than 65 business processes and over 350 reports and dashboards to expedite your implementation, as well as the flexibility to meet your specific organizational and project-level needs. This document provides specific information about Project-Level Business Processes, Company-Level Business Processes, and Organization-Level Business Processes.

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.

   For more information, see **Activity Sheet** in the *Unifier Managers User Guide*.
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, use the Create Baseline option from the Actions menu in the toolbar to create a baseline schedule, and then click the Schedule option in 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 **Cost Manager**, 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.
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

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.

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 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

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

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.
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

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 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.

Field Name	Access	Description
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.
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

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.

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
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 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

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.

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.
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 necessary permissions
Project Name	Read-Only	Name of the project
Project Number	Read-Only	Unique Project Number

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,

Field Name	Access	Description
		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.

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 version in this field.
Status	Required	Forecasts typically begin as Informal and move to Active after they are prepared for

Field Name	Access	Description
		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
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

Field Name	Access	Description
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

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.

Field Name	Access	Description
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.

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 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

Field Name	Access	Description
		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 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

Field Name	Access	Description
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 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 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.
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.

Field Name	Access	Description
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

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

Enter the description and/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 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

Field Name	Access	Description
		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
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 and/or Contract line item level.
Vendor Preferred Payment Terms	Editable	Preferred payment terms for 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 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.

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 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 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

Field Name	Access	Description
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 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 check box 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 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 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 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

Field Name	Access	Description
		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 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 and/or Contract line item level.

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 and/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

Field Name	Access	Description
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
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 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 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

Field Name	Access	Description
		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

Field Name	Access	Description
		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 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 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,

Field Name	Access	Description
		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.

Field Name	Access	Description
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.

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

Field Name	Access	Description
		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 and/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)

Field Name	Access	Description
		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 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 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

Field Name	Access	Description
		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.
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.

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 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 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.

Field Name	Access	Description
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.
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

Field Name	Access	Description
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 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.
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 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,

Field Name	Access	Description
		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

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

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
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 and/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

Field Name	Access	Description
		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 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

Field Name	Access	Description
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
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.

Field Name	Access	Description
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 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 and/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

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 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

Field Name	Access	Description
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

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 negotiations
Final Negotiated Amount	Editable	Final amount agreed with the vendor

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 and/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 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
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,

Field Name	Access	Description
		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 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)

Field Name	Access	Description
		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

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 and/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 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 Change Orders	Read-Only	The total amount of all 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

Field Name	Access	Description
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 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 and/or Contract line item level.

Vendor Information

Details of the Vendor for this Contract. If the Vendor has Unifier 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 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 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

Field Name	**Access**	**Description**
		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

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

Field Name	Access	Description
		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	Editable	Enter additional detailed

Field Name	Access	Description
Description		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.

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 and/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 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

Field Name	Access	Description
D. Current Request	Read-Only	The amount of this Potential Change Order
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

Field Name	Access	Description
		setting. Can be changed at the Contract and/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

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

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. This will be set after the record is saved, submitted,

Field Name	Access	Description
		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.

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 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 and/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 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 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

Field Name	Access	Description
		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

Field Name	Access	Description
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

Field Name	Access	Description
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 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 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.
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

Field Name	Access	Description
		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.

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 funds transfer (EFT)

Field Name	Access	Description
		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.

Field Name	Access	Description
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 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

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.

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 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

Field Name	Access	Description
		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 and/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

Field Name	Access	Description
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 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 department

Vendor Information

Details of the Vendor for this Invoice. If the Vendor has Unifier 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

Field Name	Access	Description
		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 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

Field Name	Access	Description
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 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 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

Field Name	Access	Description
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

Field Name	Access	Description
		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.

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 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 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

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,

Field Name	Access	Description
		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.

Field Name	Access	Description
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 short description

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 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
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, or you can manually enter it if no Vendor record exists.

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 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

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.

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 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

Field Name	Access	Description
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 and/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 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 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

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

Field Name	Access	Description
		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 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 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 creating Change Orders, Payment Applications, or

Field Name	Access	Description
		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
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

Field Name	Access	Description
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
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 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.
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

Field Name	Access	Description
		(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 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)

Field Name	Access	Description
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, 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

Field Name	Access	Description
		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 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 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

Field Name	Access	Description
		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

Field Name	Access	Description
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

Communication Business Process

Use the Communication business process to track correspondence that occurs amount project-related parties outside of Unifier. 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 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	Editable	This field is optional. This is

Field Name	Access	Description
(OPTIONAL)		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
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

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

Field Name	Access	Description
		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
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

Field Name	Access	Description
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

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
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 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

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 attendance
Include in next meeting?	Editable	Include whether the attendee is to be invited in

Field Name	Access	Description
		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. 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 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.

Field Name	Access	Description
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 check box.
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 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.
Permit Application Comments	Editable	Additional comments on the permit application

Field Name	Access	Description
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
Permit Agency Reference	Editable	Select the agency that will issue the permit.

Field Name	Access	Description
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

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 Name	Access	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 last updated
Creation Date	Read-Only	Date that the record was created

Field Name	Access	Description
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
Project Reporting Summary	Required	Brief description of the current project report
Project Reporting Detailed	Editable	Detailed description of the

Field Name	Access	Description
Summary		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 period
Opportunities and Challenges	Editable	Brief description of the opportunities and challenges for the report

Field Name	Access	Description
		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

Field Name	Access	Description
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 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

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
Title	Read-Only	Title of the record
Role	Required	The system automatically populates this field with the role associated with the

Field Name	Access	Description
		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
Wednesday Date	Read-Only	Wednesday's date, based on the Period Start
Wednesday Total Hours	Read-Only	Total Wednesday Hours,

Field Name	Access	Description
		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
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

Field Name	Access	Description
		workflow BP record is based on the workflow action preceding the current workflow step.

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

Field Name	Access	Description
		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 check box 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
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
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

Field Name	Access	Description
		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

Field Name	Access	Description
		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
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
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

Field Name	Access	Description
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
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

Field Name	Access	Description
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

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

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

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

Field Name	Access	Description
		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

Field Name	Access	Description
		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

Field Name	Access	Description
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

Field Name	Access	Description
		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

Field Name	Access	Description
		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.
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

Field Name	Access	Description
		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 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

Field Name	Access	Description
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

s

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 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

Field Name	Access	Description
Project Number	Read-Only	Unique Project Number

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
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

Field Name	Access	Description
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
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 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

Field Name	Access	Description
		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

Field Name	Access	Description
		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

Field Name	Access	Description
		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

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.
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

Field Name	Access	Description
		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
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

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 Name	Access	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
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 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

Field Name	Access	Description
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

Field Name	Access	Description
		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 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

Field Name	Access	Description
		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	Editable	If selected, the system

Field Name	Access	Description
Order?		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

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

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 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

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.
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

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 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.

Field Name	Access	Description
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.
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

Field Name	Access	Description
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

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

Field Name	Access	Description
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

Field Name	Access	Description
		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

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

Field Name	Access	Description
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

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

Field Name	Access	Description
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. 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

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

Field Name	Access	Description
		reporting purposes.
Checklist Item Number	Editable	Use this field to order Project Closeout Checklist items for views and reporting purposes.

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	Editable	Is the warranty

Field Name	Access	Description
Attached?		documentation attached to this record? If not, provide a 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 and/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	Read-Only	Tier 5 of the area location

Field Name	Access	Description
Reference		

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 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

Field Name	Access	Description
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

Field Name	Access	Description
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 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.

Field Name	Access	Description
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.
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.

Record Information

System information about this record

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

Field Name	Access	Description
		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 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.

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.

Field Name	Access	Description
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.
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

Field Name	Access	Description
		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

Field Name	Access	Description
		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
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

Field Name	Access	Description
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

Field Name	Access	Description
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 workflow step.

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

Field Name	Access	Description
		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.

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	

Field Name	Access	Description
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 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

Field Name	Access	Description
		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

Field Name	Access	Description
		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 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

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 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.

Field Name	Access	Description
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

Field Name	Access	Description
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 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

Field Name	Access	Description
		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

Field Name	Access	Description
		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 Publish Path	Editable	The location of the folder in 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

Field Name	Access	Description
		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 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

Field Name	Access	Description
		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 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	Editable	The location of the folder in

Field Name	Access	Description
Path		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.
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 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

Field Name	Access	Description
		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
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	Editable	The location of the folder in

Field Name	Access	Description
Publish Path		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 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

Field Name	Access	Description
		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 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 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 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.

Field Name	Access	Description
		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 (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.

Field Name	Access	Description
		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
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

Field Name	Access	Description
		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 Acknowledge Step	Editable	If selected, the system 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

Field Name	Access	Description
		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
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

Field Name	Access	Description
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 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

Field Name	Access	Description
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
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	Editable	If selected, the system

Field Name	Access	Description
Acknowledge Step		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
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 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

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 Name	Access	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 Hours, from the Project Hours tab
Tuesday Non-Project Hours	Read-Only	Total Tuesday Non-Project Hours, from the Non-Project

Field Name	Access	Description
		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
Saturday Project Hours	Read-Only	Total Saturday Project Hours, from the Project Hours tab
Saturday Non-Project Hours	Read-Only	Total Saturday Non-Project

Field Name	Access	Description
		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.

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 check box 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
Monday Project Hours	Editable	Total Monday Project Hours, from the Project Hours tab

Field Name	Access	Description
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 Hours tab
Tuesday Non-Project Hours	Editable	Total Tuesday Non-Project Hours, from the Non-Project Hours tab

Field Name	Access	Description
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 and/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

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.
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.

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

Field Name	Access	Description
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 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

Field Name	Access	Description
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 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

Field Name	Access	Description
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 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 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

Field Name	Access	Description
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

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.
External User	Required	Indicates whether the vendor (user) is not a Unifier user. If the vendor (user) is not a Unifier 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 user account

Field Name	Access	Description
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
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

Field Name	Access	Description
Business Process Record URL	Read-Only	A shareable link to this record, for anyone with the necessary permissions

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 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.
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. 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

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
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
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

Field Name	Access	Description
		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

Field Name	Access	Description
		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

Field Name	Access	Description
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	
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
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.

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 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.

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
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 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

Field Name	Access	Description
		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
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	Editable	The location of the folder in

Field Name	Access	Description
Publish Path		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 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

Field Name	Access	Description
		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
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

Field Name	Access	Description
		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 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

Field Name	Access	Description
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. 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

Field Name	Access	Description
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
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

Field Name	Access	Description
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
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

Field Name	Access	Description
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.

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

Field Name	Access	Description
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) 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

Field Name	Access	Description
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) 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 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 user either by typing characters in the text box or click the **Select** icon. You

Field Name	Access	Description
		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 out-of-the-box (OOTB) version of Unifier Accelerator 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