Oracle
Primavera Unifier
Administration Guide for NEC4

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Contents

Oracle Primavera Unifier Administration Guide for NEC4

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About This Guide

The New Engineering Contract (NEC) is a formalized system created by the United Kingdom (UK) Institution of Civil Engineers that guides the drafting of documents on civil engineering, construction, and maintenance projects for the purpose of obtaining tenders, and awarding and administering contracts. NEC4 is the current suite of NEC Contracts. The contracts are suitable to procure a full array of works, services, and supplies, ranging from a major framework to small-scale projects.

Primavera Unifier is a project lifecycle management solution for capital planning, project delivery, cost control, and facilities and real estate management. Unifier provides governance across all project phases, from planning and building to operations and maintenance.

This guide explains how an administrator can work with Unifier and NEC4 and covers a range of topics, including how to set up vendors, suppliers, and team members; create contracts; and manage groups.

For more information on Oracle Primavera Unifier, see the Oracle Primavera Unifier Documentation. View our entire collection of documentation for the Unifier application. The documentation library also includes links to FAQs, training, and support. Our guides include:

- Unifier General User Guide
- Unifier Business Processes User Guide
- Unifier Managers User Guide

Accessing Your Contract Shell

To access the contract shell in **User Mode**:

1) In the **Tabs** bar, select the **+** icon to the right of the **Company Workspace** tab.
   The **All Locations** form is displayed.
2) From the **All Locations** form, select the **Location** icon.
   A list of all locations you have access to is displayed.
3) Select your location or project.
4) Select your contract.

Adding Vendors & Contacts

To add vendors and contacts in **User Mode**:

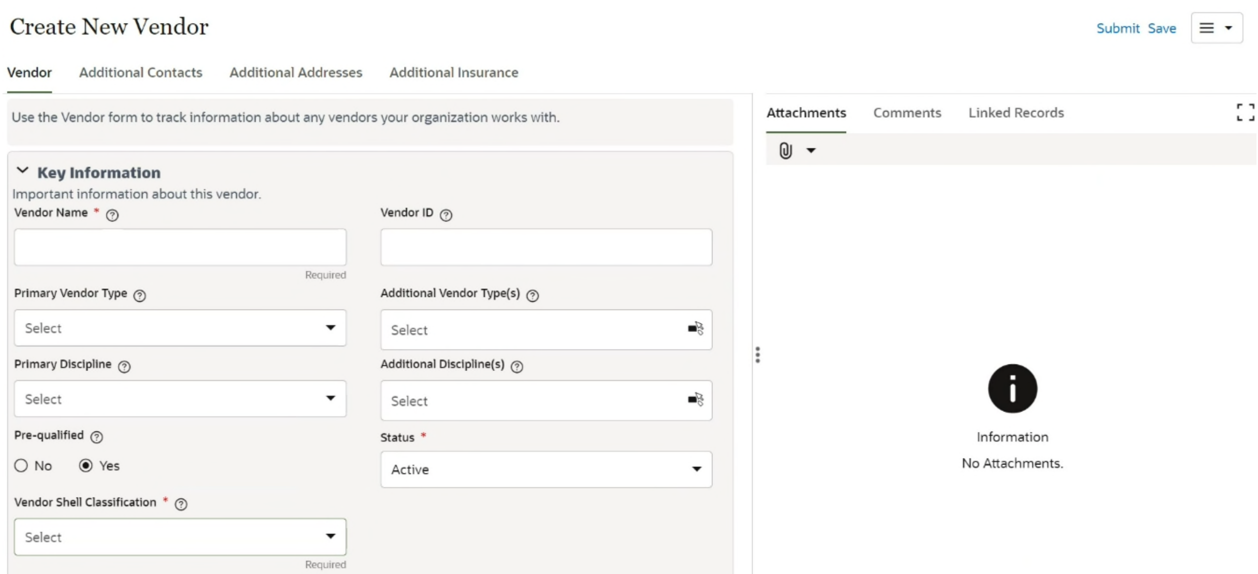
1) Navigate to the **Company Workspace** tab.
2) From left **Navigator**, select **Company Logs**, and then select **Vendor**.
3) Select **Create.**

   The **Vendor** form is displayed.
4) Select the **Vendor** tab to add new vendors.
5) Complete the fields for the new vendor.

   Do not forget to enter information in the **Primary Contact** fields.
6) Select the **Additional Contacts** tab.
7) Complete all the required fields.

   If required, you can add multiple contacts.
8) Select **Save**.
9) Optional. Add additional addresses or insurance for the vendor on the **Additional Addresses** or **Additional Insurance** tabs, respectively.
10) Once you complete the details for your vendor and contacts, select the **Submit** button.

   You can now see the newly added vendor from the left **Navigator** by selecting **Company Logs**, and then select **Vendor**.



Creating a Contract

To create a contract in **User Mode**:

1) In the **Tabs** bar, select the **+** icon to the right of the **Company Workspace** tab.

   The **All Locations** form is displayed.

2) From the **All Locations** form, select the **Location** icon.

   A list of all locations you have access to is displayed.

3) Select the project for which you want to create a contract and select **Select**.

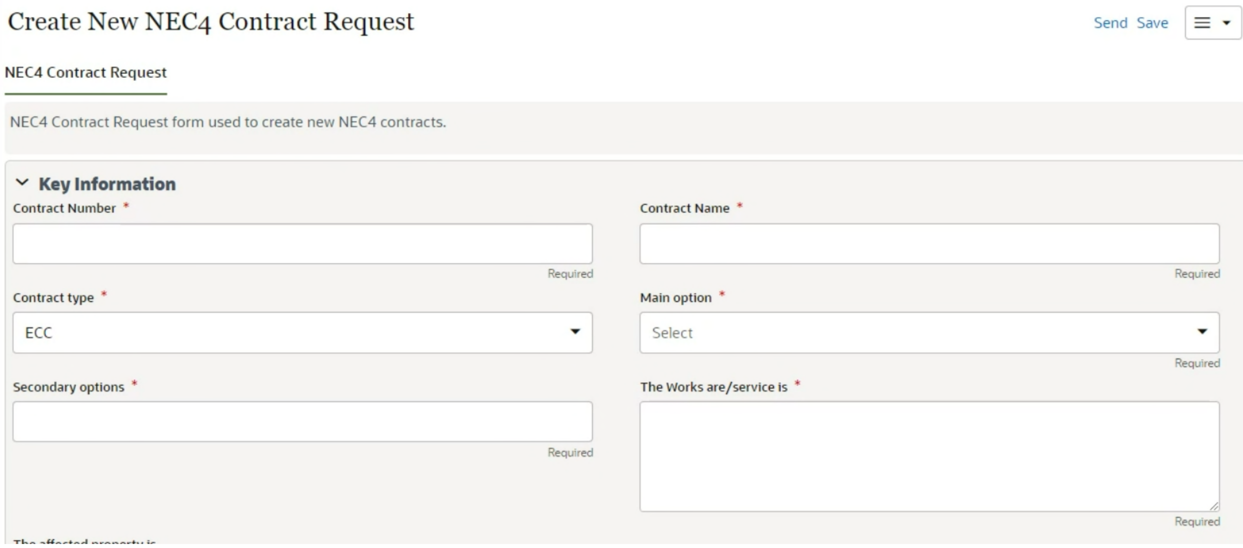
4) After you choose a project, select **NEC4 Contract Administration**, and then select **NEC4 Contract Request** from the left **Navigator.**

5) Select **Create**.
   - A **New NEC4 Contract** form is displayed.
   - There are pre-configured shell templates for each available contract type. Each template includes all the appropriate workflows and permission groups for that contract.

6) Complete all the required fields.
   - When completing the party's information, you will select the client, project/service manager, supervisor, and contractor/consultant from a list of vendors you previously created.
   - After you select your vendor, your list of **Key Persons** filters to show only team members for that supplier.

7) Select **Send** to submit the form for approval.
   - The **Workflow Action Details** list the users who will receive the contract request for approval.
   - The status of the contract changes to **Pending** and the application creates a task for the listed users to review the contract.
   - To approve a contract, the user will select the contract request from their task list and select **Accept**.
   - After accepting the contract, the user can send the contract on to the final step by selecting **Send**.

8) When you receive the contract, select **Approved** from the workflow actions. This will approve the contract and create the new contract shell.



Setting Up an NEC4 Contract

Use the **Contract Setup** form to set up an NEC4 **Contract Shell**.

To set up an NEC4 contract in **User Mode**:

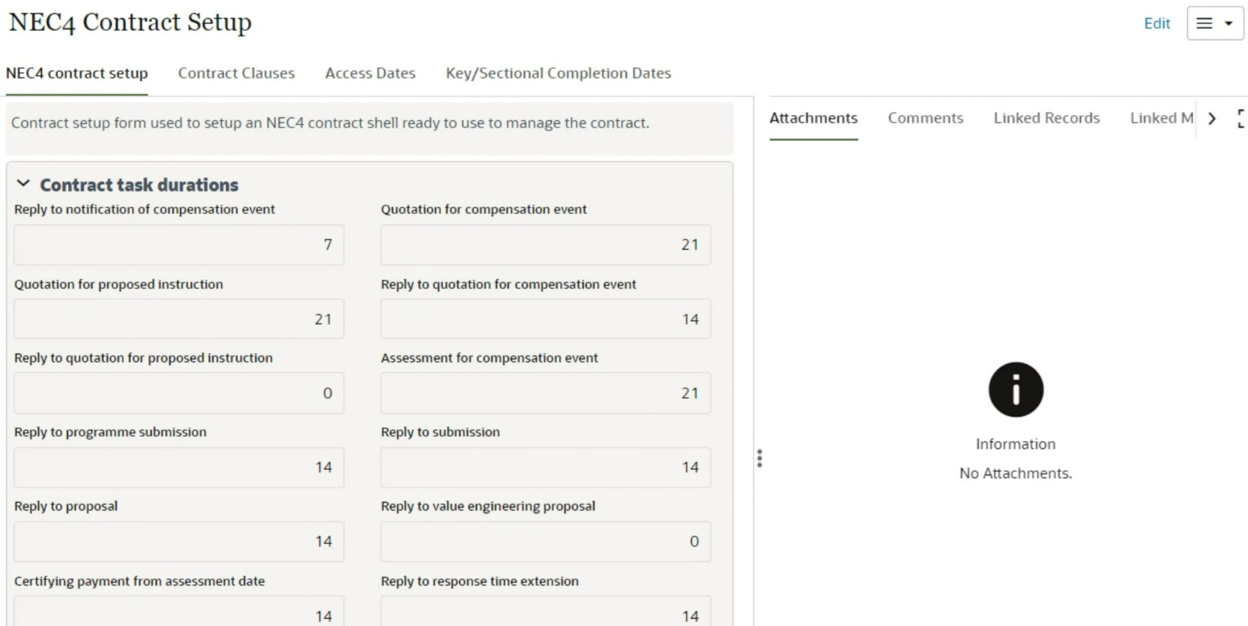
1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **NEC4 Contract Setup**.
3) Select **Edit**.
4) Select the **NEC4 Contract Setup** tab.

   From this tab, you can edit **Contract Task Durations**, **Contract Clauses**, and **Access Dates & Key/Sectional Completion Dates** relevant to the template type.
5) Complete the fields you need to update.
6) Select the **Contract Clauses** tab.
   - The list of available clauses are relevant to the **Template Type**.
   - If required, you can now amend the **Contract Clauses** or add new **Contract Clauses** for this contract.
7) Select **Add**.
8) Complete all the required fields.
9) Choose the clause filters which apply to this clause.
10) Select **Save** to add your contract clause.

    After you submit the NEC4 contract, you can view the contract clauses you added from the left **Navigator** by selecting **NEC4 Contract Administration**, and then select **Contract Clauses**.
11) Select the **Access Dates** tab.
12) Select the **Add** button and complete all the required fields.
13) Select **Save**.
    - If required, you can add multiple access dates.
    - Once you submit the contract, your access dates will become available in the NEC4 contract workflows.
    - After you submit the NEC4 contract, you can view the access dates from the left **Navigator** by selecting **NEC4 Contract Dates**, and then select **Access Dates**.
14) Select the **Key/Sectional Completion Dates** tab.
15) Select the **Add** button.
16) Complete all the required fields.

    If required, you can add multiple key/sectional completion dates.
17) Select **Save**.
18) Select **Submit** to complete the NEC4 Contract Setup.
    - Your key/sectional completion dates are now available in the NEC4 Contract workflows.

- You can access your key/sectional completion dates from the left **Navigator** by selecting **NEC4 Contract Dates**, and then select **Key/Sectional Completion Dates**.



Adding Users to a Contract

To add users to a contract:

1) Navigate to your **Contract Shell**.
2) Select the cog icon in the top right corner to change to **Admin Mode**.
3) From the left **Navigator**, select **User Administration**, and then select **Users**.
4) Select **New** to add users.
5) Highlight one or more existing user you want to add.
6) Select the **Add** button.

   These users will now appear in the **Selected Users/Groups** section.
7) Select **OK** to add the users to the contract.

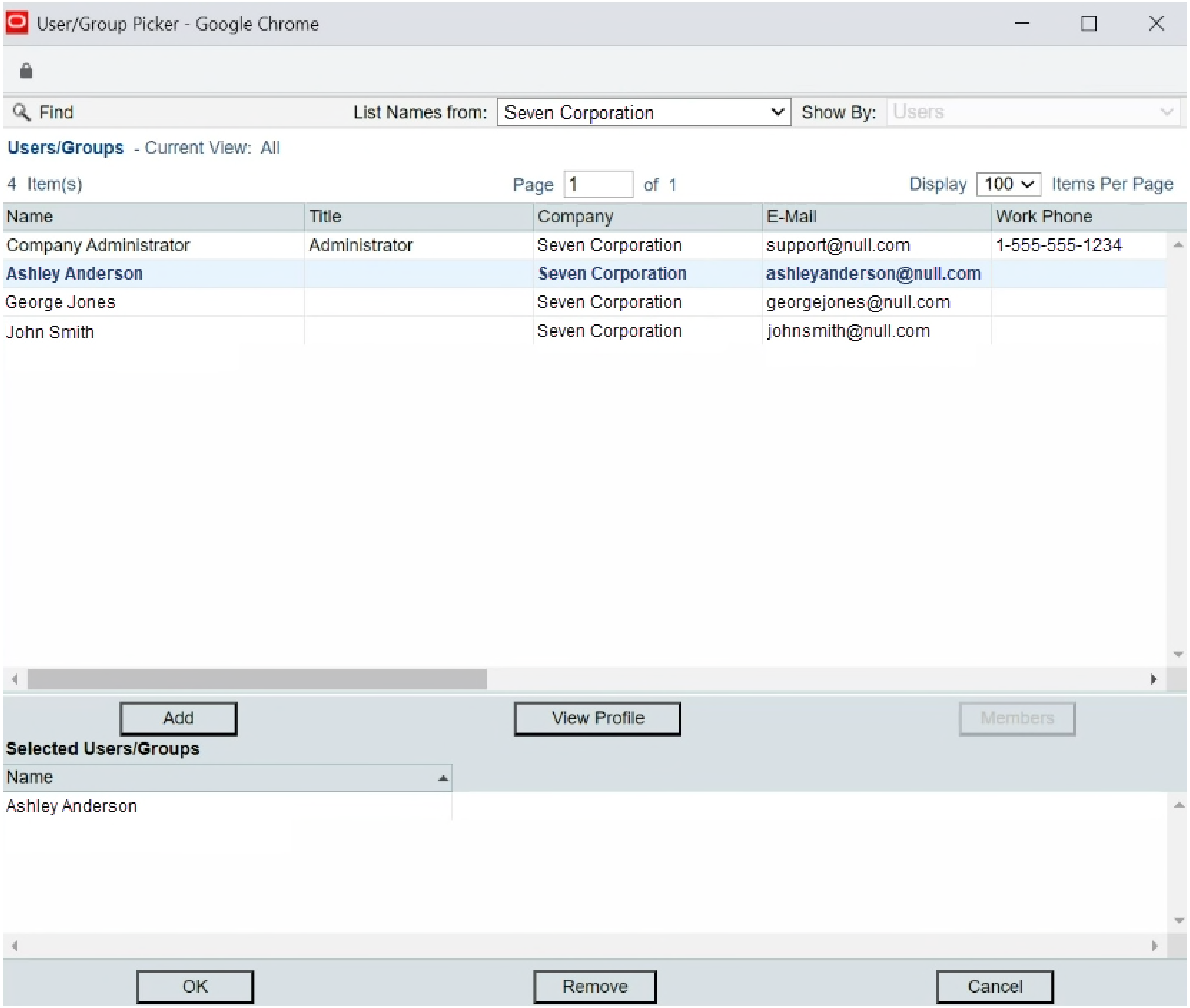
Adding Users to a Group

To add users to a group:

1) Navigate to your **Contract Shell**.
2) Select the cog icon in the top right corner to change to **Admin Mode**.
3) From the left **Navigator**, select **User Administration**, and then select **Groups**.
4) Select the **Members** tab.
5) Select **Add**.

   Select a user's name to highlight it.
6) After selecting a user, select **Add**.
   - The user's name displays in the **Selected Users/Groups** section.
   - You can add multiple users to a group.

7) When finished, select **OK**.



Creating a Contract Financial Breakdown

The contract's financial breakdown includes the activity schedule or bill of quantities.

To create and view your contract financial breakdown in **User Mode**:

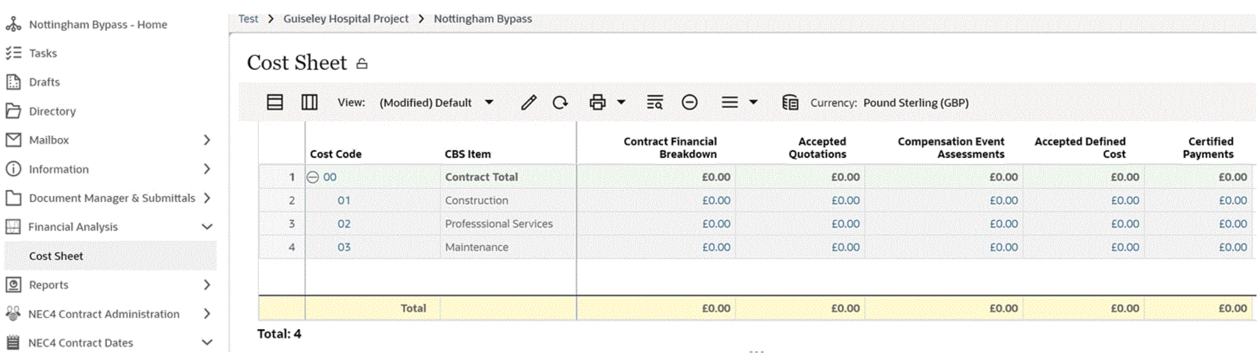
1) Navigate to the **Company Workspace** tab.
2) From the left **Navigator**, select **Financial Analysis**, and then select **Cost Sheet**.
   - The cost sheet is displayed.
   - The **Contract Financial Breakdown** is £0.00.
3) From the left **Navigator**, select **NEC4 Contract Administration**, and then select **Contract Financial Breakdown**.
4) Select **Create**.

   The **Contract Financial Breakdown** form is displayed.
5) Complete all the required fields.
6) Select the **Contract Financial Breakdown** tab.
7) Complete all the required fields.

   If required, you can add multiple line items.
8) Select the **+** icon to open the **Cost Code Picker** and allocate the **Not Costed Amount** to the **Cost Breakdown Structure** (**CBS**).

   If required, you can complete multiple line items.
9) Select **Save**.
10) Select **Send** to submit the contract financial breakdown.

    The application sends the contract to the Finance Administrator and the status changes to **Pending**.



In This Section

Completing a Contract Financial Breakdown

To complete a contract financial breakdown task as a Finance Administrator:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the task for the contract financial breakdown.

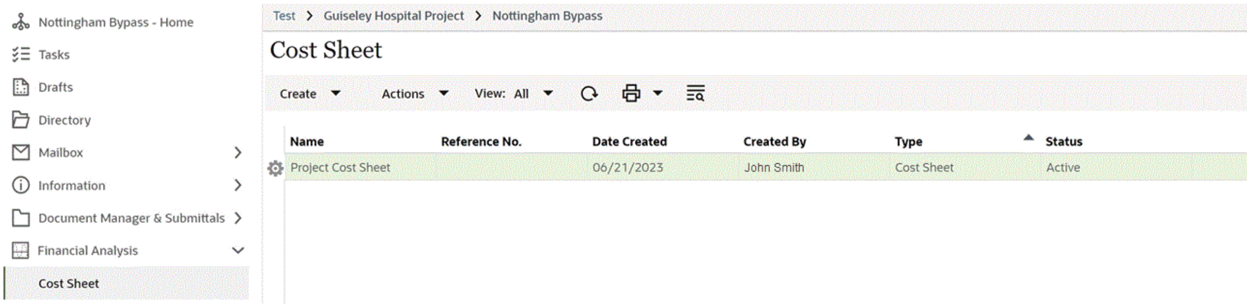
   The **Contract Financial Breakdown** form is displayed.
4) Select **Accept**.
5) From the **Workflow Options** drop-down, select where to send the form:
   - Send for Creator Update
   - Approved
   - Rejected
   - Cancel.
6) Select **Send** to submit the contract financial breakdown.

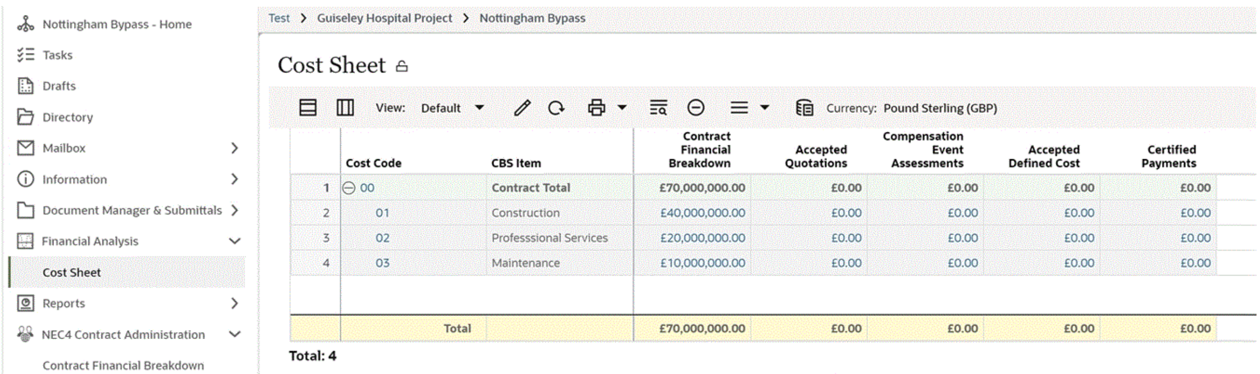
Viewing an Approved Financial Breakdown

To view an accepted contract financial breakdown:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Financial Analysis**, and then select **Cost Sheet**.

3) Select the project cost sheet to open it.



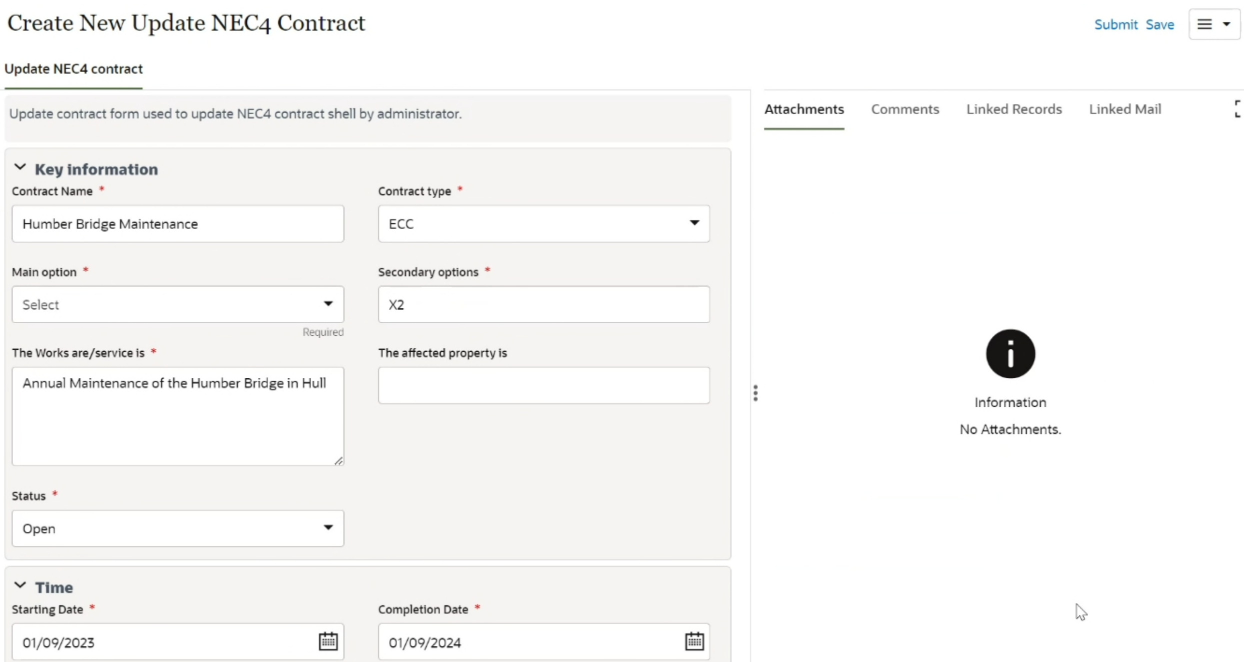


Updating an NEC4 Contract

Use the **Contract** form to update the **NEC4 Contract Shell**.

To update an NEC4 contract in **User Mode**:

1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **Update NEC4 Contract**.
3) In the NEC4 contract, edit the information you want to change.
4) When finished updating the contract, select **Submit**.

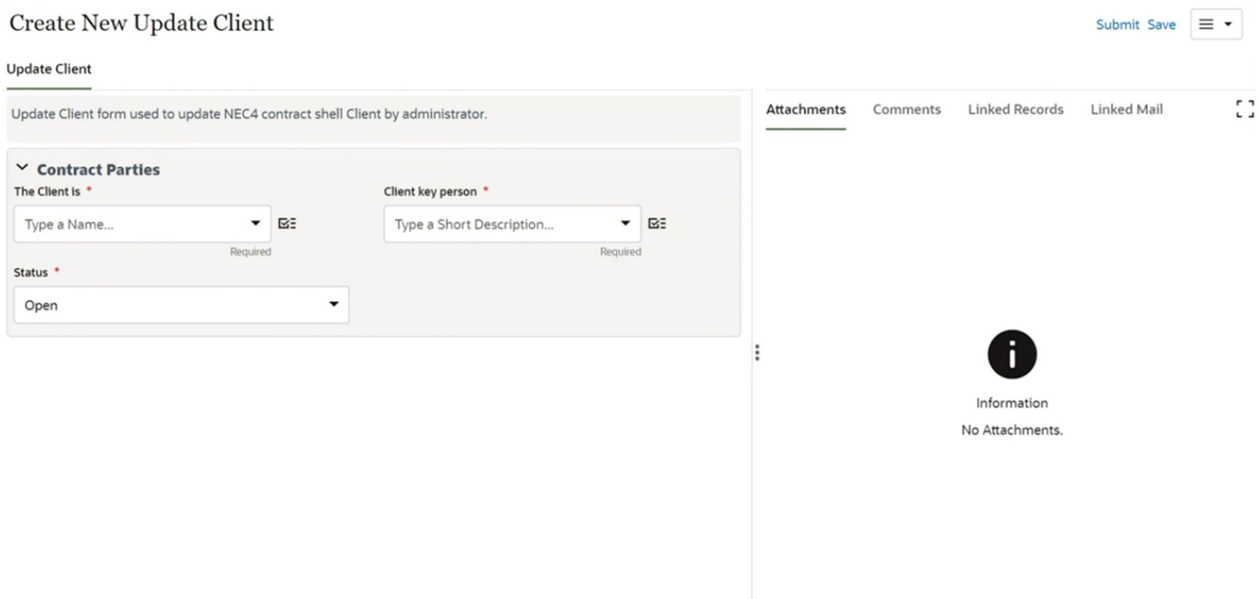


Updating a Client

Use the **Update Client** form to update the **NEC4 Contract Shell** client.

To update a client in **User Mode**:

1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **Update Client**.
3) Complete all the required fields.
4) When finished, select **Submit**.

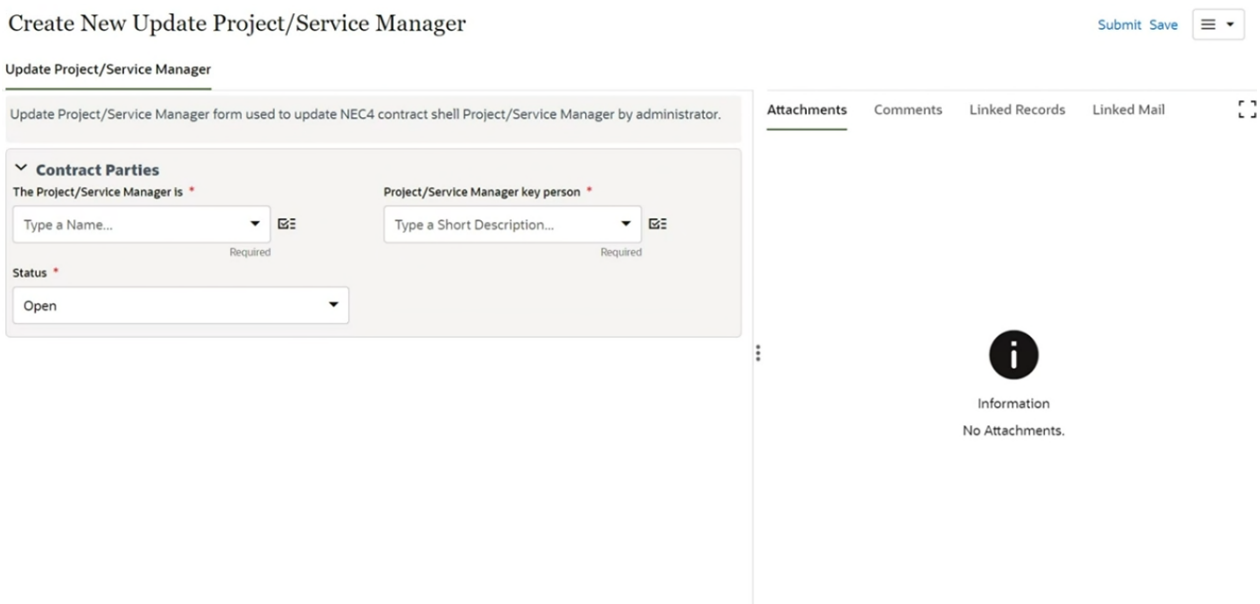


Updating a Project/Service Manager

Use the **Project/Service Manager** form to update **NEC4 Contract Shell** project/service manager.

To update a project/service manager in **User Mode**:

1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **Update Project/Service Manager**.
3) Complete all the required fields.
4) When finished, select **Submit**.

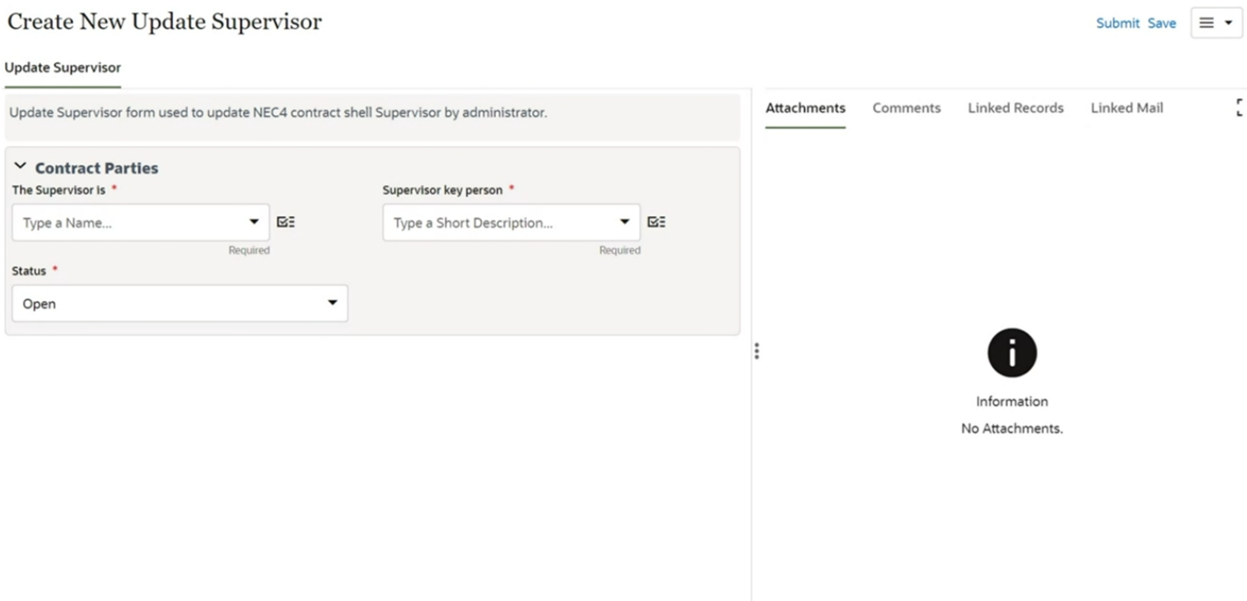


Updating a Supervisor

Use the **Supervisor** form to update **NEC4 Contract Shell** supervisor.

To update a supervisor in **User Mode**:

1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **Update Supervisor**.
3) Complete all the required fields.
4) When finished, select **Submit**.



Updating a Contractor/Consultant

Use the **Contractor/Consultant** form to update **NEC4 Contract Shell** contractor/consultant.

To update a contractor/consultant in **User Mode**:

1) From the left **Navigator**, select **Information**, and then select **General**.
2) Select **Update Contractor/Consultant**.
3) Complete all the required fields.
4) When finished, select **Submit**.