

Oracle
Primavera Unifier
Administration Guide for NEC4

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Contents

About This Guide.....	5
Accessing Your Contract Shell	7
Adding Vendors & Contacts	9
Creating a Contract.....	11
Setting Up an NEC4 Contract	13
Adding Users to a Contract	15
Adding Users to a Group.....	17
Creating a Contract Financial Breakdown	19
Completing a Contract Financial Breakdown	20
Viewing an Approved Financial Breakdown.....	20
Updating an NEC4 Contract.....	23
Updating a Client	25
Updating a Project/Service Manager	27
Updating a Supervisor	29
Updating a Contractor/Consultant	31

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**.

Create New Vendor Submit Save

Vendor Additional Contacts Additional Addresses Additional Insurance

Use the Vendor form to track information about any vendors your organization works with.

Key Information
Important information about this vendor.

Vendor Name *

Vendor ID

Primary Vendor Type

Additional Vendor Type(s)

Primary Discipline


Additional Discipline(s)

Pre-qualified ☐ No ☒ Yes

Status

Vendor Shell Classification *

Attachments Comments Linked Records


Information
No Attachments.

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.

Create New NEC4 Contract Request

Send Save

NEC4 Contract Request

NEC4 Contract Request form used to create new NEC4 contracts.

Key Information

Contract Number *

Required

Contract type *

ECC

Secondary options *

Required

Contract Name *

Required

Main option *

Select

Required

The Works are/service is *

Required

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**.

NEC4 Contract Setup Edit

NEC4 contract setup Contract Clauses Access Dates Key/Sectional Completion Dates

Contract setup form used to setup an NEC4 contract shell ready to use to manage the contract.

Contract task durations

Reply to notification of compensation event

7

Quotation for proposed instruction

21

Reply to quotation for proposed instruction

0

Reply to programme submission

14

Reply to proposal

14

Certifying payment from assessment date

14

Quotation for compensation event

21

Reply to quotation for compensation event

14

Assessment for compensation event

21

Reply to submission

14

Reply to value engineering proposal

0

Reply to response time extension

14

Attachments

Comments

Linked Records

Linked M

>

[

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i

Information

No Attachments.

14

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.



Last Name	First Name	Company	Title	Login User Name	E-Mail	Work
Administrator	Company	Seven Corporation		admin	support@null.com	1-81
Smith	John	Seven Corporation		johnsmith	john.smith@null.com	
Anderson	Ashley	Seven Corporation		ashleyanderson	ashley.johnson@null.com	

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**.

User/Group Picker - Google Chrome

Find List Names from: Seven Corporation Show By: Users

Users/Groups - Current View: All

4 Item(s) Page 1 of 1 Display 100 Items Per Page

Name	Title	Company	E-Mail	Work Phone
Company Administrator	Administrator	Seven Corporation	support@null.com	1-555-555-1234
Ashley Anderson		Seven Corporation	ashleyanderson@null.com	
George Jones		Seven Corporation	georgejones@null.com	
John Smith		Seven Corporation	johnsmith@null.com	

Add View Profile Members

Selected Users/Groups

Name

Ashley Anderson

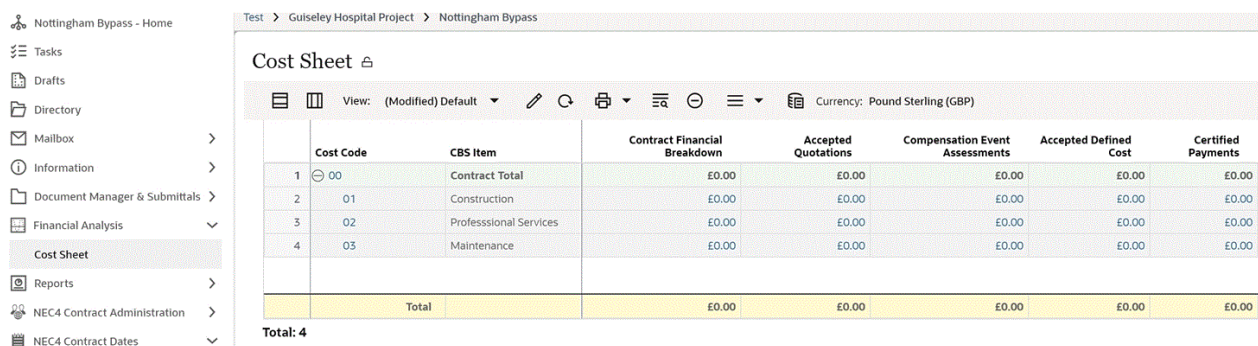
OK Remove Cancel

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**.



	Cost Code	CBS Item	Contract Financial Breakdown	Accepted Quotations	Compensation Event Assessments	Accepted Defined Cost	Certified Payments
1	00	Contract Total	£0.00	£0.00	£0.00	£0.00	£0.00
2	01	Construction	£0.00	£0.00	£0.00	£0.00	£0.00
3	02	Professional Services	£0.00	£0.00	£0.00	£0.00	£0.00
4	03	Maintenance	£0.00	£0.00	£0.00	£0.00	£0.00
Total			£0.00	£0.00	£0.00	£0.00	£0.00

In This Section

Completing a Contract Financial Breakdown	20
Viewing an Approved Financial Breakdown	20

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.

Contract Financial Breakdown

Send Save 

General Contract Financial Breakdown

General Contract Financial Breakdown		Attachments	Comments	Linked Records	Linked Mail	V	>	:
<p>Financial Breakdown Information</p> <p>Amount</p> <p>£70,000,000.00</p>		<p> </p>						
<p>Description</p> <p>Description *</p> <p>Financial Breakdown for Nottingham Bypass.</p>								

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.

Nottingham Bypass - Home

Tasks

Drafts

Directory

Mailbox

Information

Document Manager & Submittals

Financial Analysis

Cost Sheet

Test > Guiseley Hospital Project > Nottingham Bypass

Cost Sheet

Create Actions View: All

Name	Reference No.	Date Created	Created By	Type	Status
Project Cost Sheet		06/21/2023	John Smith	Cost Sheet	Active

Nottingham Bypass - Home

Tasks

Drafts

Directory

Mailbox

Information

Document Manager & Submittals

Financial Analysis

Cost Sheet

Reports

NEC4 Contract Administration

Contract Financial Breakdown

Test > Guiseley Hospital Project > Nottingham Bypass

Cost Sheet

View: Default

Currency: Pound Sterling (GBP)

	Cost Code	CBS Item	Contract Financial Breakdown	Accepted Quotations	Compensation Event Assessments	Accepted Defined Cost	Certified Payments
1	00	Contract Total	£70,000,000.00	£0.00	£0.00	£0.00	£0.00
2	01	Construction	£40,000,000.00	£0.00	£0.00	£0.00	£0.00
3	02	Professional Services	£20,000,000.00	£0.00	£0.00	£0.00	£0.00
4	03	Maintenance	£10,000,000.00	£0.00	£0.00	£0.00	£0.00
Total			£70,000,000.00	£0.00	£0.00	£0.00	£0.00

Total: 4

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**.

Create New Update NEC4 Contract

Submit Save 

Update NEC4 contract

Update contract form used to update NEC4 contract shell by administrator.

Key Information

Contract Name *

Humber Bridge Maintenance

Contract type *

ECC

Main option *

Select

Required

Secondary options *

X2

The Works are/service is *

Annual Maintenance of the Humber Bridge in Hull

The affected property is

Status *

Open

Time

Starting Date *

01/09/2023

Completion Date *

01/09/2024

Attachments

Comments

Linked Records

Linked Mail



Information

No Attachments.

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**.

Create New Update Client

Submit Save 

Update Client

Update Client form used to update NEC4 contract shell Client by administrator.

Contract Parties

The Client is *

Type a Name...



Required

Client key person *

Type a Short Description...



Required

Status *

Open

Attachments

Comments

Linked Records

Linked Mail



Information

No Attachments.

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**.

Create New Update Project/Service Manager

Submit Save 

Update Project/Service Manager

Update Project/Service Manager form used to update NEC4 contract shell Project/Service Manager by administrator.

Contract Parties

The Project/Service Manager is *

Type a Name...

Required

Project/Service Manager key person *

Type a Short Description...

Required

Status *

Open

Attachments

Comments

Linked Records

Linked Mail



Information

No Attachments.

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**.

Create New Update Supervisor

Submit Save 

Update Supervisor

Update Supervisor form used to update NEC4 contract shell Supervisor by administrator.

Contract Parties

The Supervisor is *

Type a Name...

Required

Supervisor key person *

Type a Short Description...

Required

Status *

Open

Attachments

Comments

Linked Records

Linked Mail



Information

No Attachments.

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**.

Create New Update Contractor/Consultant

Submit Save 

Update Contractor/Consultant

Update Contractor/Consultant form used to update NEC4 contract shell Contractor/Consultant by administrator.

Contract Parties

The Contractor/Consultant is *

Type a Name...

Required

Contractor/Consultant key person *

Type a Short Description...

Required

Status *

Open

Attachments

Comments

Linked Records

Linked Mail



Information

No Attachments.