Oracle
Primavera Unifier
User Guide for NEC4 Contractor

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Contents

Oracle Primavera Unifier User Guide for NEC4 Contractor

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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 contractors and clients can work with Unifier and NEC4 and covers a range of topics, including how to submit plans, defect notifications, and requests for payment; define costs and forecasts; and create reports.

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.

Common Unifier Tasks

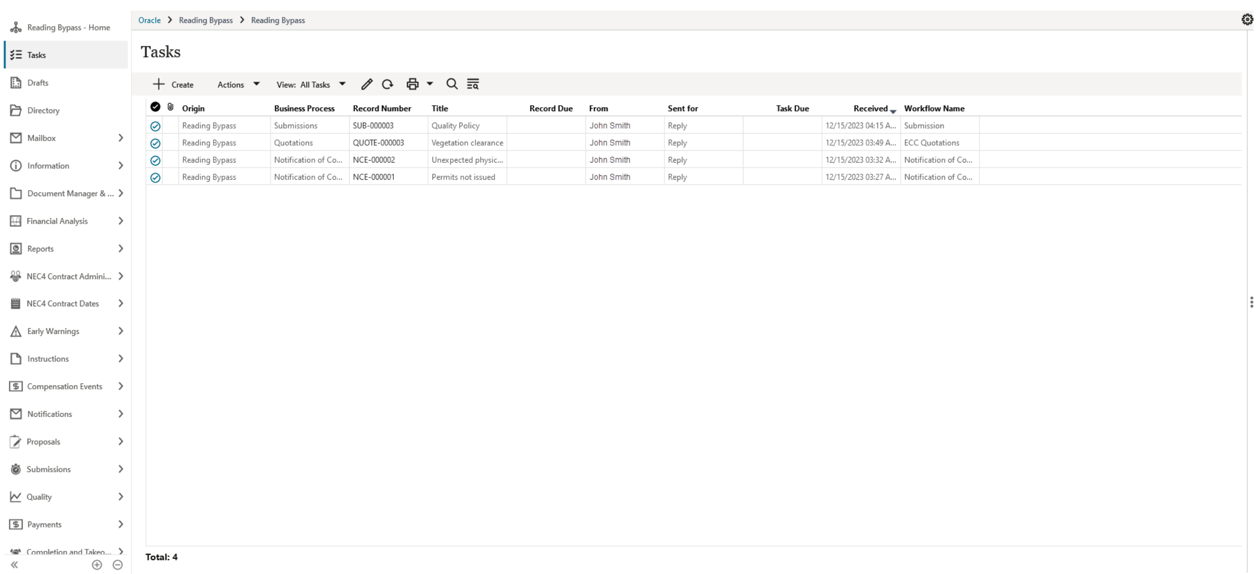
This section includes tasks you can perform across all business processes while working within the application.

In This Section

Viewing Your Tasks

To view tasks assigned to you:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Contract**, and then select **Tasks**.



Updating the NEC4 Contract Dashboard

To view your **NEC4 Contract Dashboard**:

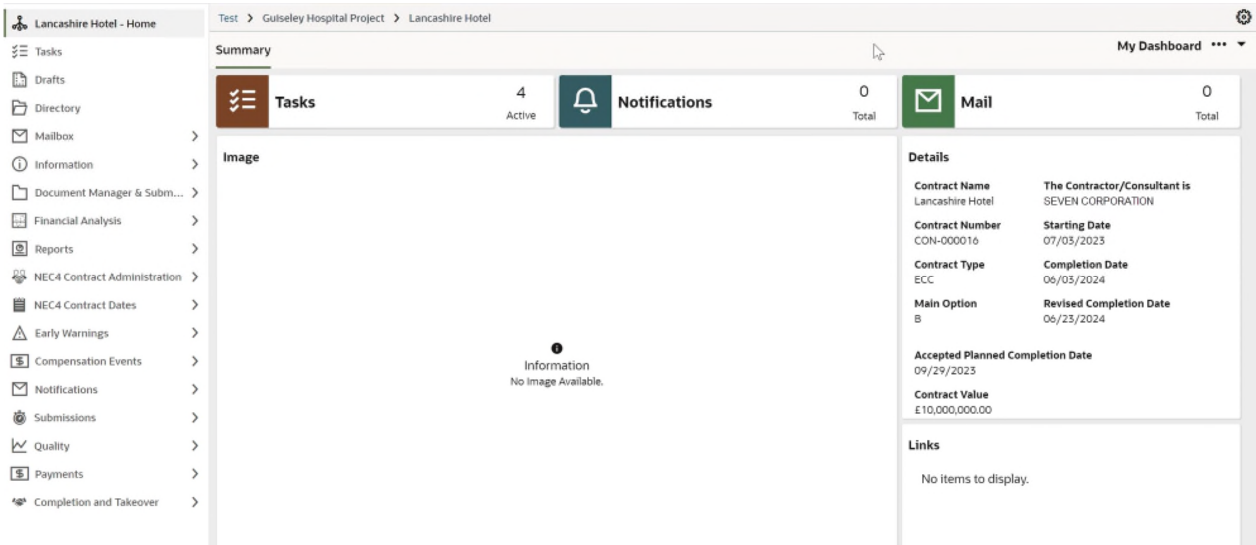
1) From the top left corner, select the contract name.

   The dashboard defaults to the **My Dashboards** view.

2) To change the view to your **NEC4 Contract Dashboard**, select the **...** icon in the top right corner and select **NEC4 Contract**.

   The **NEC4 Contract Dashboard** shows the contract summary and includes bars and graphs to illustrate the contract information.

3) Optional. Select the **...** icon and choose **My Dashboard** to change back to the **My Dashboards** view.



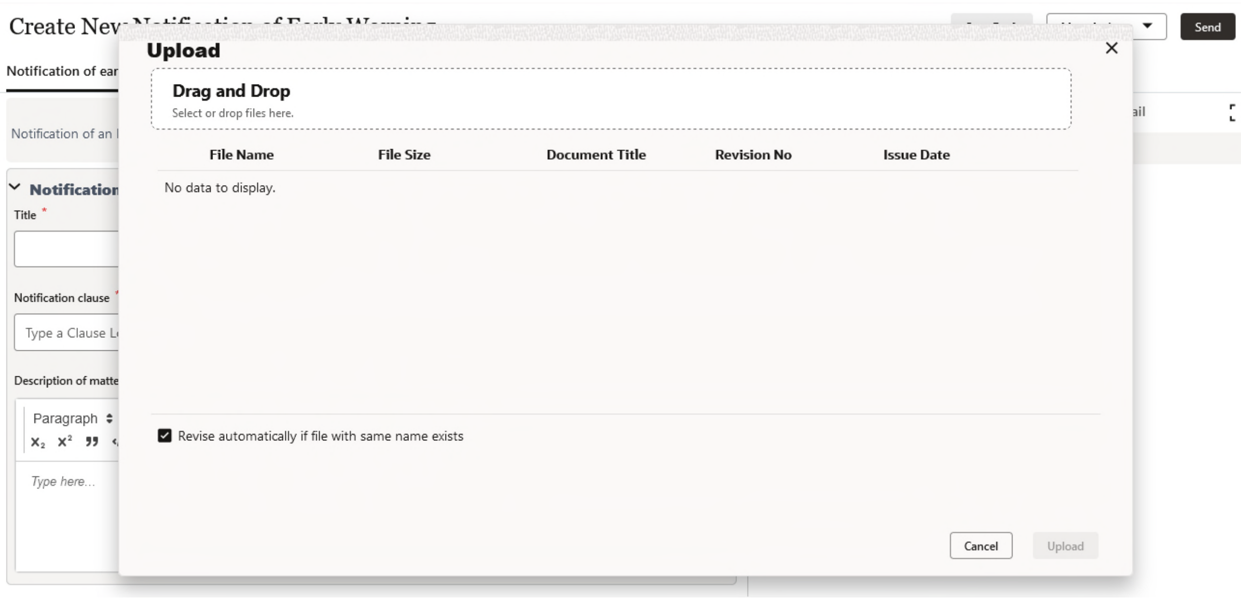
Adding Attachments to a Notification

You can upload attachments to every notification.

To add an attachment:

1) Select the **Attachments** tab.
2) From the **Attachments** panel, select the **paper clip** icon.
3) Either:
   - Drag and drop files
   - Use the **Browse** button to find a file.
4) After adding your files, select **Upload**.

All added attachments are added to the **Attachment** panel in the workflow.



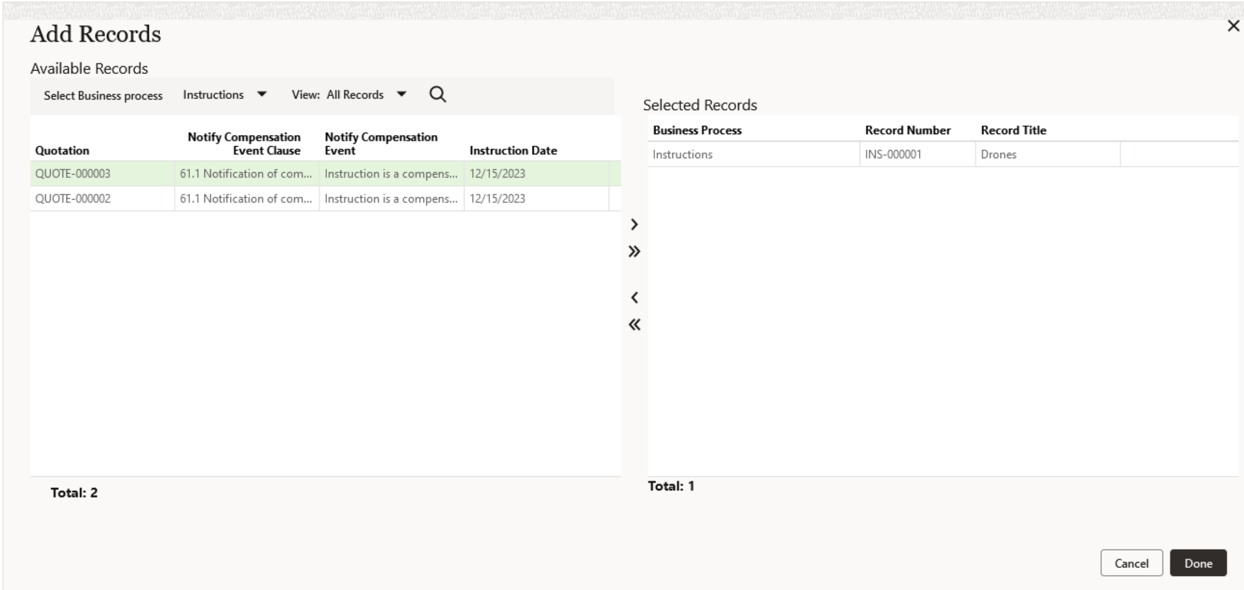
Creating a Reference Process to Link Notifications

You can link notifications by using the **Linked Records** tab.

To link notifications:

1) Select the **Linked Records** tab on the right panel.
2) Select the **Add** icon from the **Linked Records** pane. The **Add Records** dialogue box is displayed.
3) From the **Select Business process** drop-down menu, select the business process type to open all records of that business process type.
4) Select the records you want to link. Use the **>** arrow to move an individual record to the **Selected Records** panel, or select **>>** to move all records.
5) Repeat steps 3 and 4 for other business process types.

6) Select **Done**.



Creating a Response Time Extension Notification

Response Time Extension is available across a number of business processes and are created the same way in each.

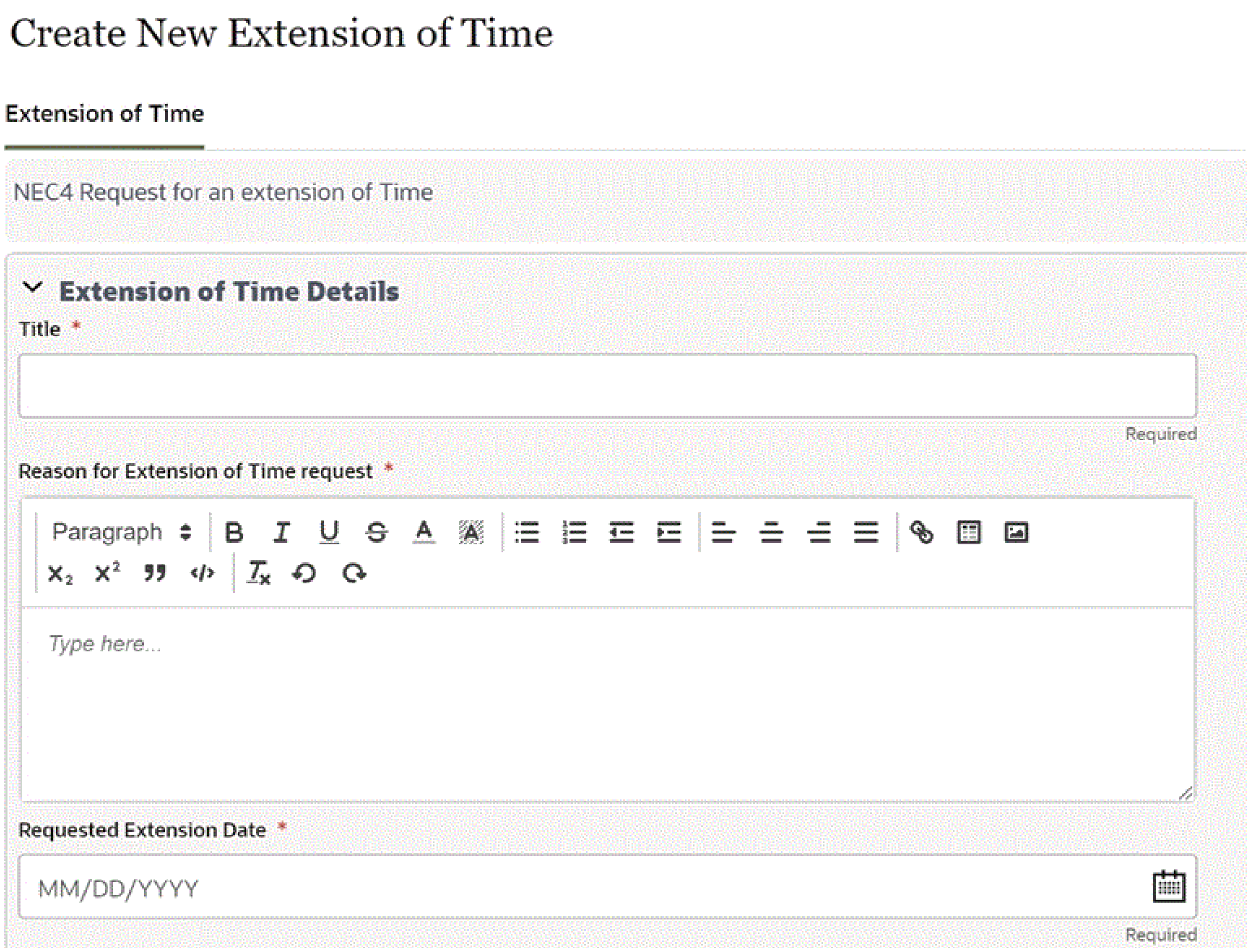
To create a response time extension notification:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Submissions**, and then select **Programmes**.
   - All fields in the top block are auto-populated by the application.
   - The **Reply** form is displayed.
3) Select **Accept**.
4) Select the **Extension for Time** tab.
5) Select **Create**.

   The **Extension of Time** form is displayed.
6) From the **Extension of Time** form, select **Create**.
7) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
8) When finished, select **Send** to submit the **Extension of Time** for acceptance.
   - You can now access the response time extension from the left **Navigator** by selecting **Submissions**, and then selecting **Extension of Time**.

- The application creates a task for the other party to review.



Adding Key/Sectional Completion Dates

Key/Sectional Completion Dates for the NEC4 contract are available across a number of business processes and are created the same way in each.

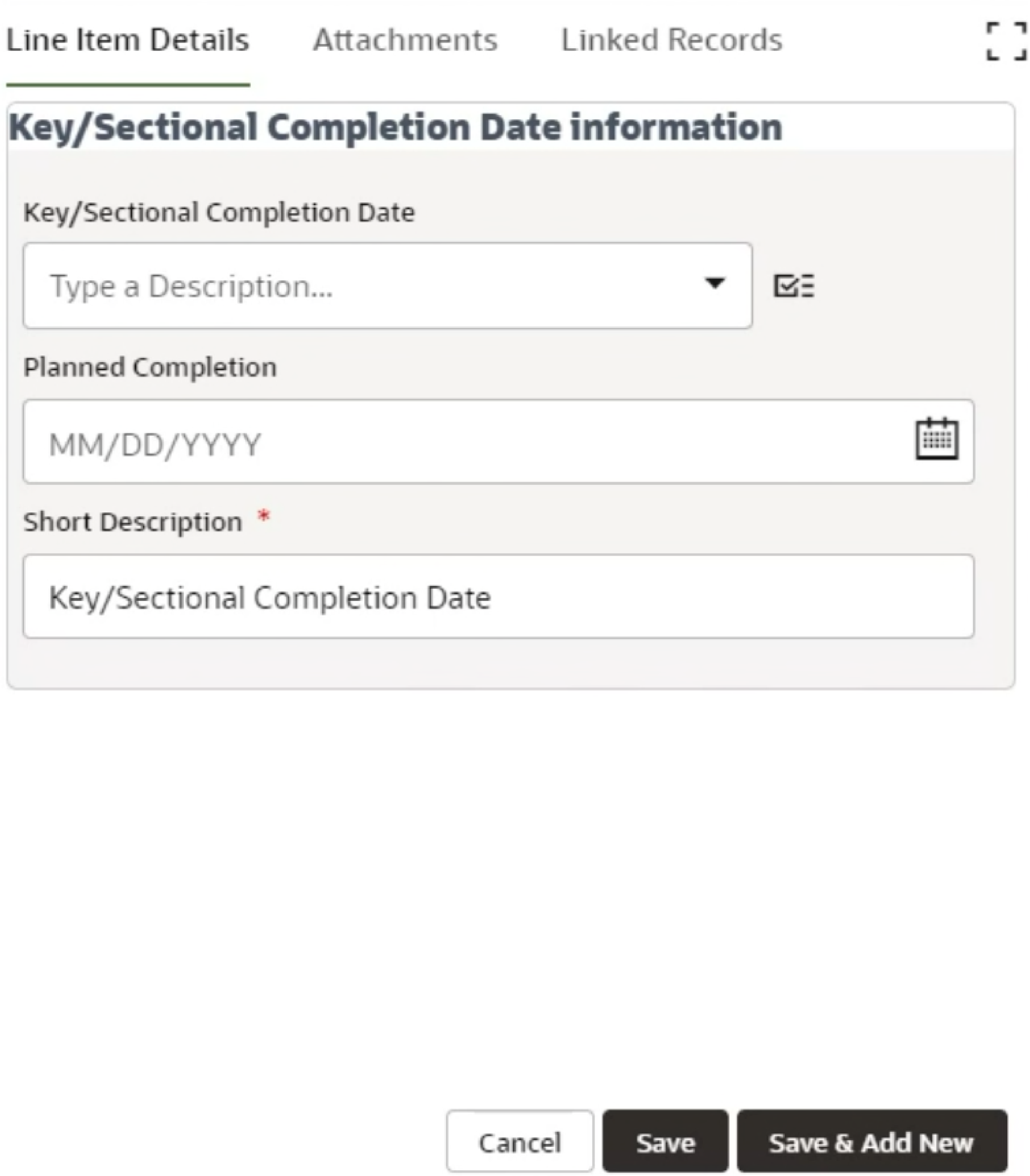
To add key/sectional completion dates:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **NEC4 Contract Dates**, and then select **Key/Sectional Dates**.

   All key sectional completion dates submitted by the administrator are available to view.
3) Select the **Key/Sectional Completion Dates** tab.
4) Select **Add** to create a new line item.

   If required, you can add multiple line item records.
5) Select the **clause picker** icon next to **Key/Sectional Completion Date clause** to view all clauses available for selection on this notification.
6) Once you complete all fields, select **Save**.

7) Select **Send** to submit the record.
   - You can now access the notification from the left **Navigator** by selecting **Submissions**, and then selecting **Programmes**.
   - The application creates a task for the other party to review.



Creating an Early Warning Notification

To create an early warning notification:

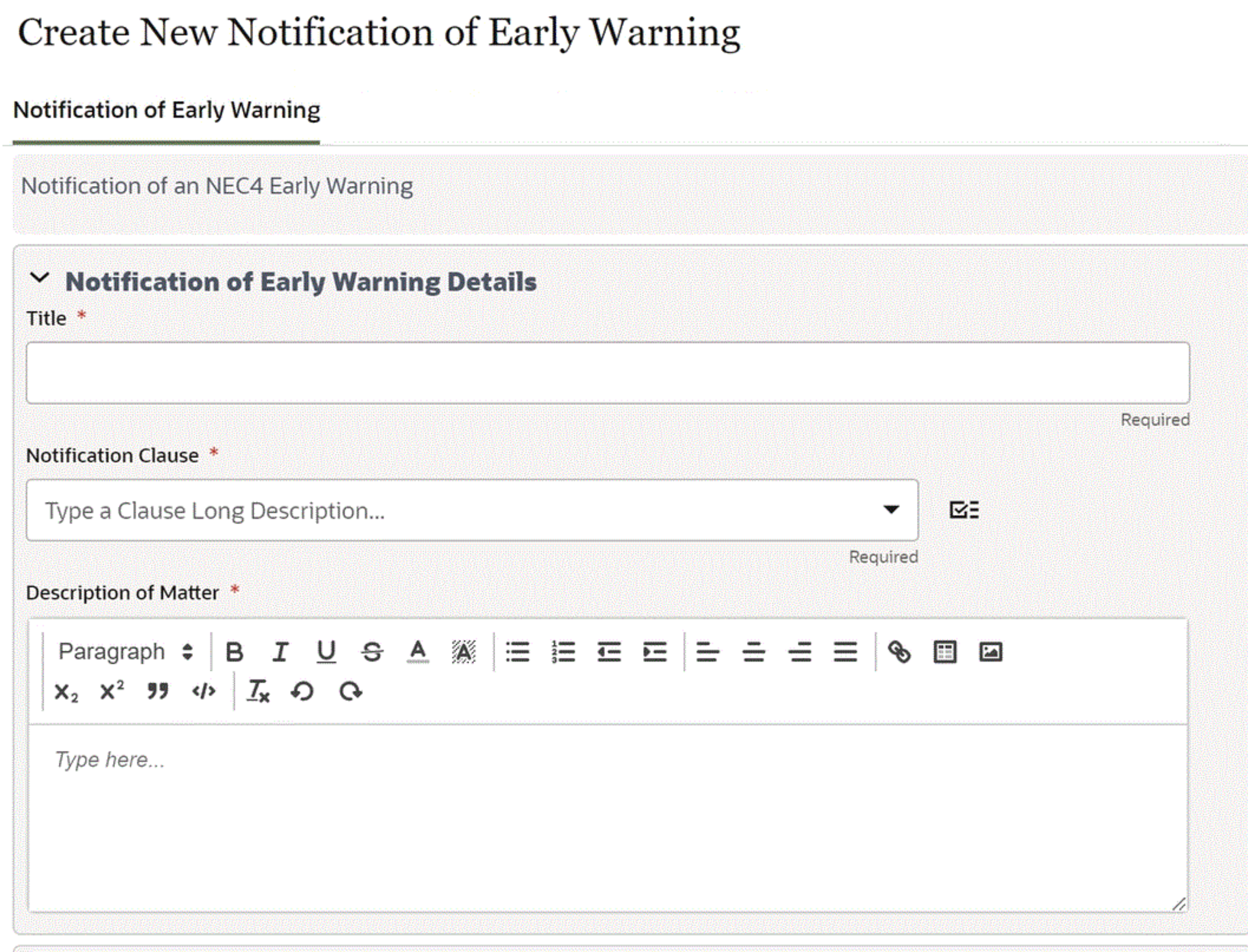
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Early Warnings**, and then select **Notification of Early Warning**.
3) Select **Create**.

   The **Notification of Early Warning** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send this form without completing the required fields.
5) Select the **clause picker** icon next to **Notification clause** to view all clauses available for selection on this notification.
6) From the **Matter Could** section, make a selection.

   You cannot proceed until you select at least one option.
7) Select **Send** to notify users of the early warning.
   - The project manager can now access the notification from the **Early Warning Register**.

- The notification's status changes to **Open**.



Submitting Instructions

You can create instructions for a notification of compensation event and a quotations request in the **NEC4 Contract Shell**.

To submit instructions:

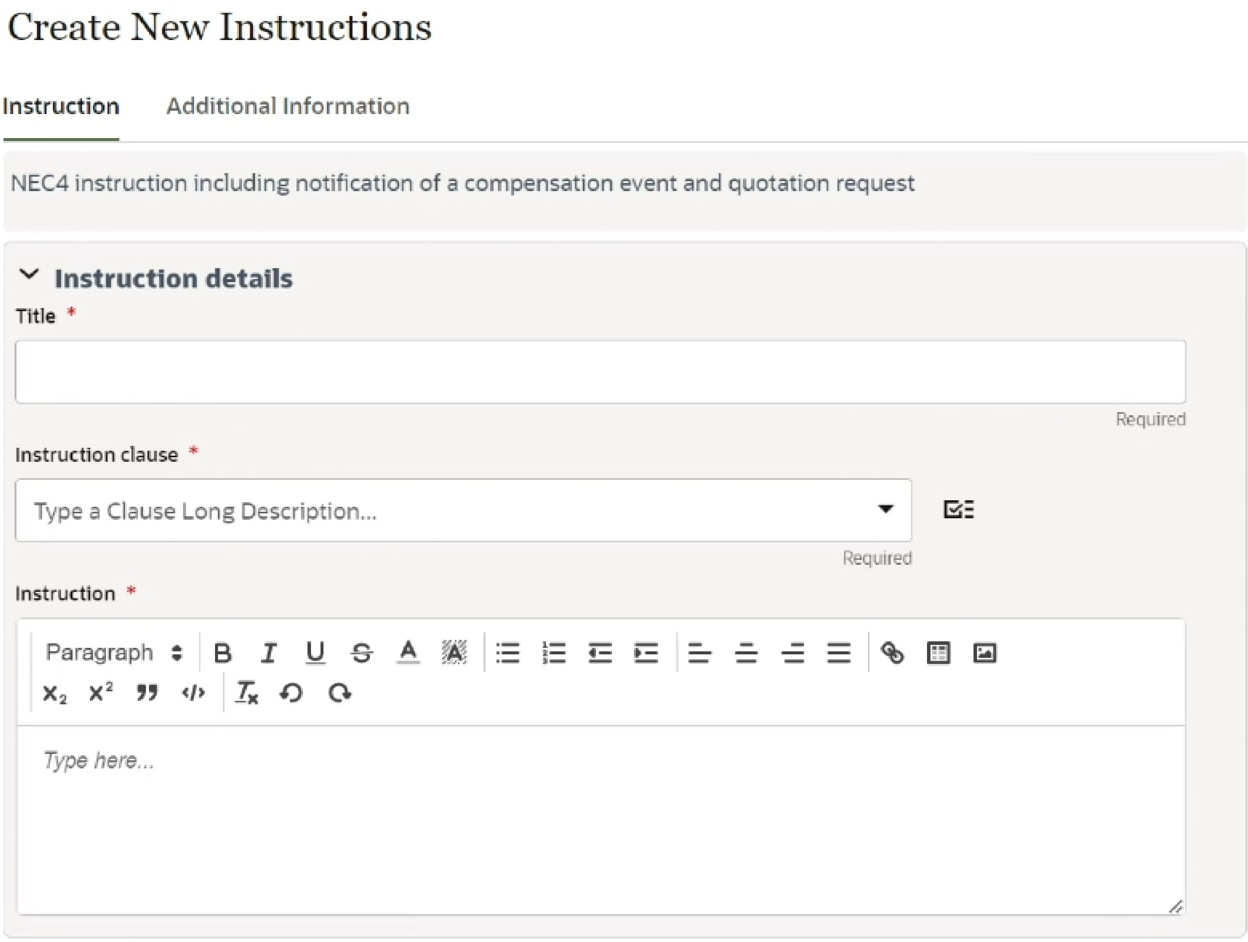
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Instructions**, and then select **Instructions**.
3) Select **Create**.

   The **Instruction** form is displayed.
4) Populate all the required fields.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to the **Instruction clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to add more information.

   If required, you can add multiple line item records.
7) Select **Send** to submit the instruction.

The instruction is now available for viewing.



Creating a Notification of Compensation Event

To create a notification of compensation event:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Notification of Compensation Event**.

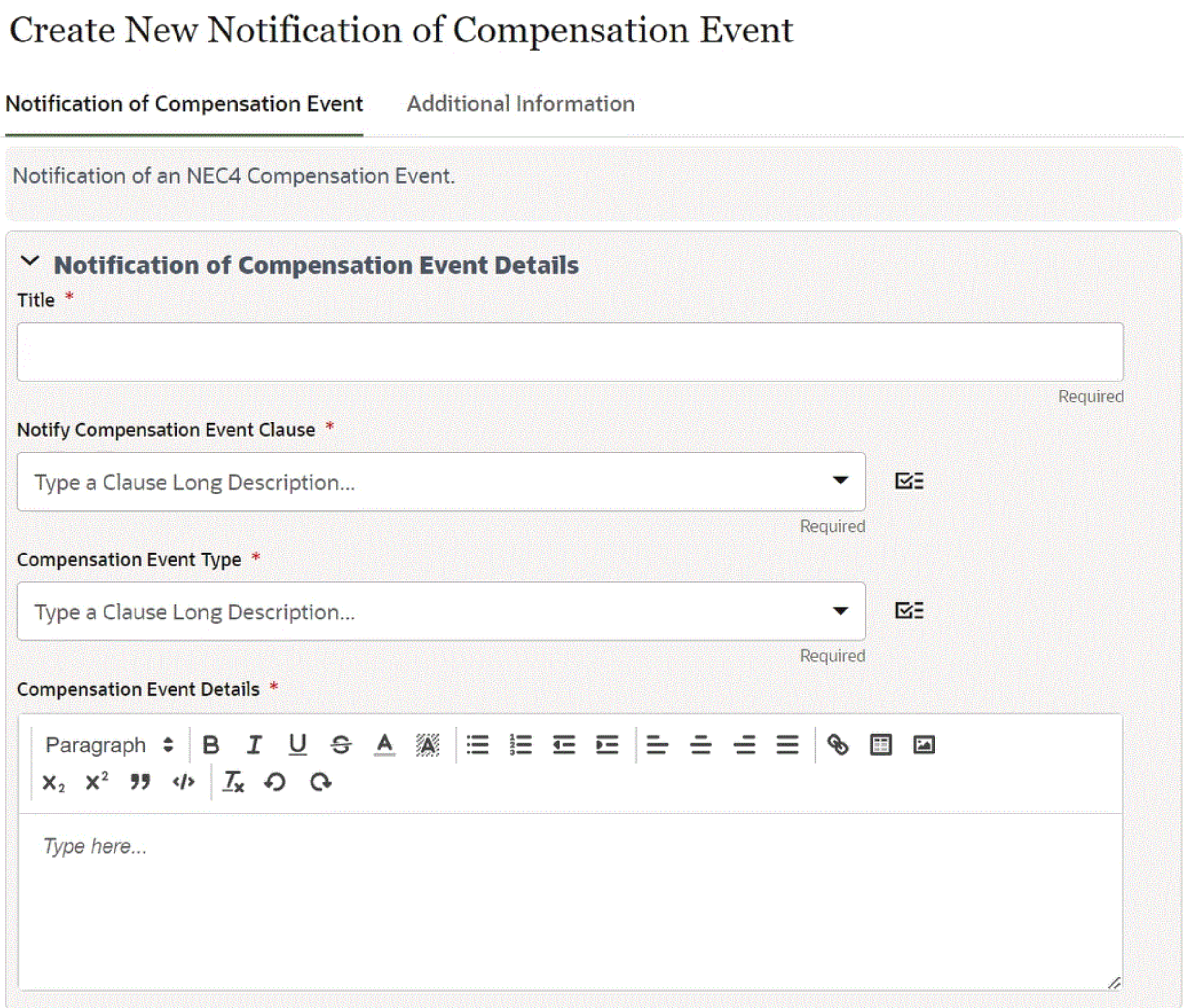
   A **Notification of Compensation Event** form is displayed.
3) Select **Create**.

   The **Notification of Compensation Event** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send this form without completing the required fields.
5) Select the **clause picker** icon next to the **Notify Compensation Event clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to add more details.

   If required, you can add multiple line item records.
7) Once you complete all necessary fields, select **Send** to notify users of the compensation event.
   - You can now access the notification from the left **Navigator** by selecting **Compensation Events**, and then selecting **Notification of Compensation Event**.

- The application creates a task for project manager/service manager/client to review.



Creating a Notification of Compensation Event (Short Contract)

You can send a notification of an NEC4 compensation event on a short form contract. This notification includes a quotation.

To create a notification of compensation event (short contract):

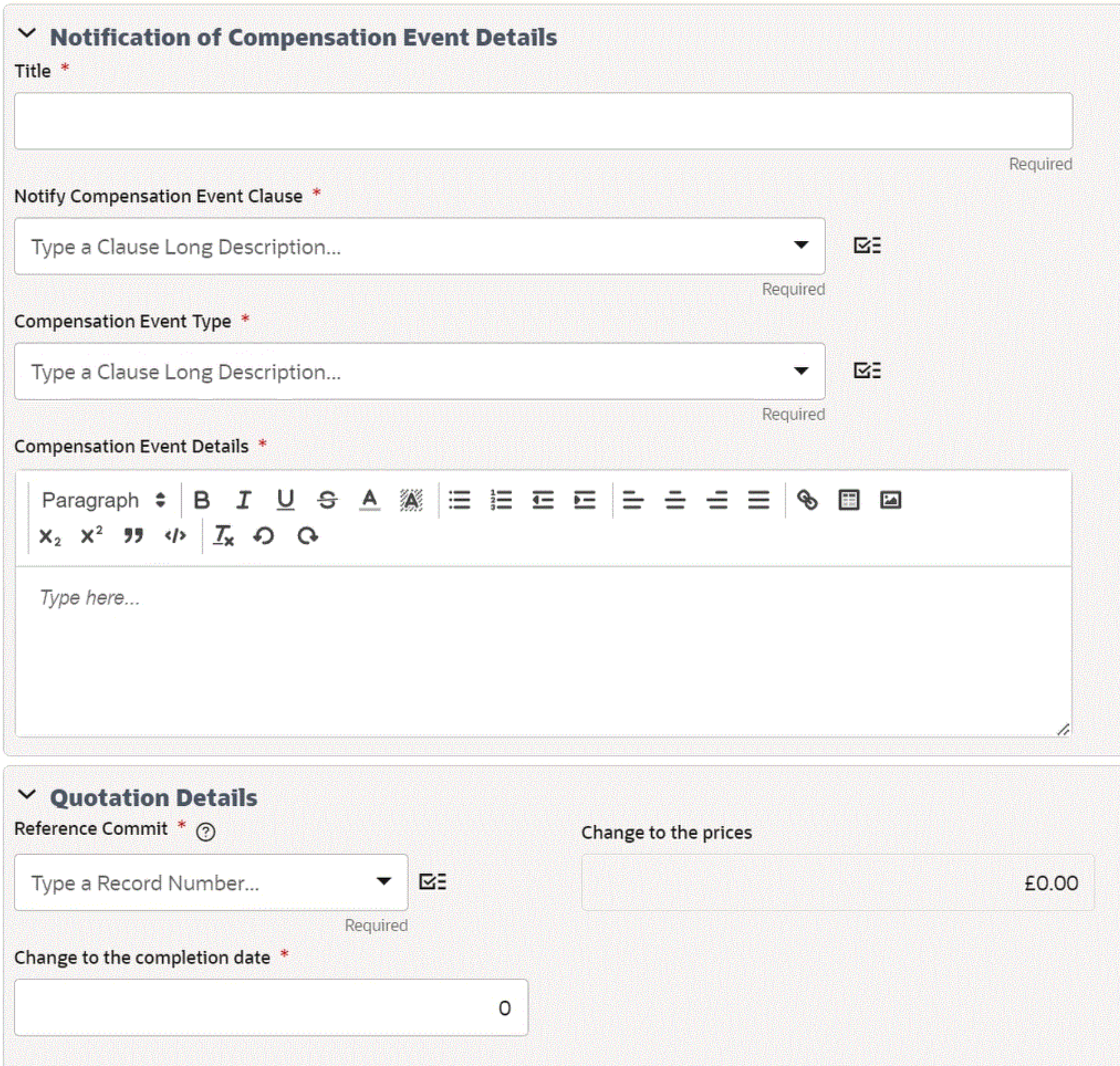
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Notification of Compensation Event (Short Contract)**.
3) Select **Create**.

   The **Notification of Compensation Event (Short Contract)** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send this form without completing the required fields.
5) Select the **clause picker** icon next to **Notification Compensation Event Clause** to view all clauses available for selection on this notification.
6) To populate the **Contract Financial Breakdown**, select **Reference Commit**.
7) Select the **Quotation Breakdown** tab to complete the cost line items.
8) Select **Add** to select the line item type.
9) Complete all the required fields and select **Save** to add the line item to the quotation items.

   If required, you can add multiple line items.
10) Once you complete all fields, select **Send** to notify users of the compensation event.
    - You can now access the notification from the left Navigator by selecting **Compensation Events**, and then selecting **Notification of compensation Event (Short Contract).**

- The application creates a task for the project manager/service manager/client to review the notification.



Submitting a Quotation

Quotations in an NEC4 contract are created for compensation events and proposed instructions.

To submit a quotation:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the **Quotation** task.
    - The **Quotation** form is displayed.
    - The system has auto-populated all fields in the top section.
4) Select **Accept** to interact with the record.
5) Complete all the required fields in the notification.

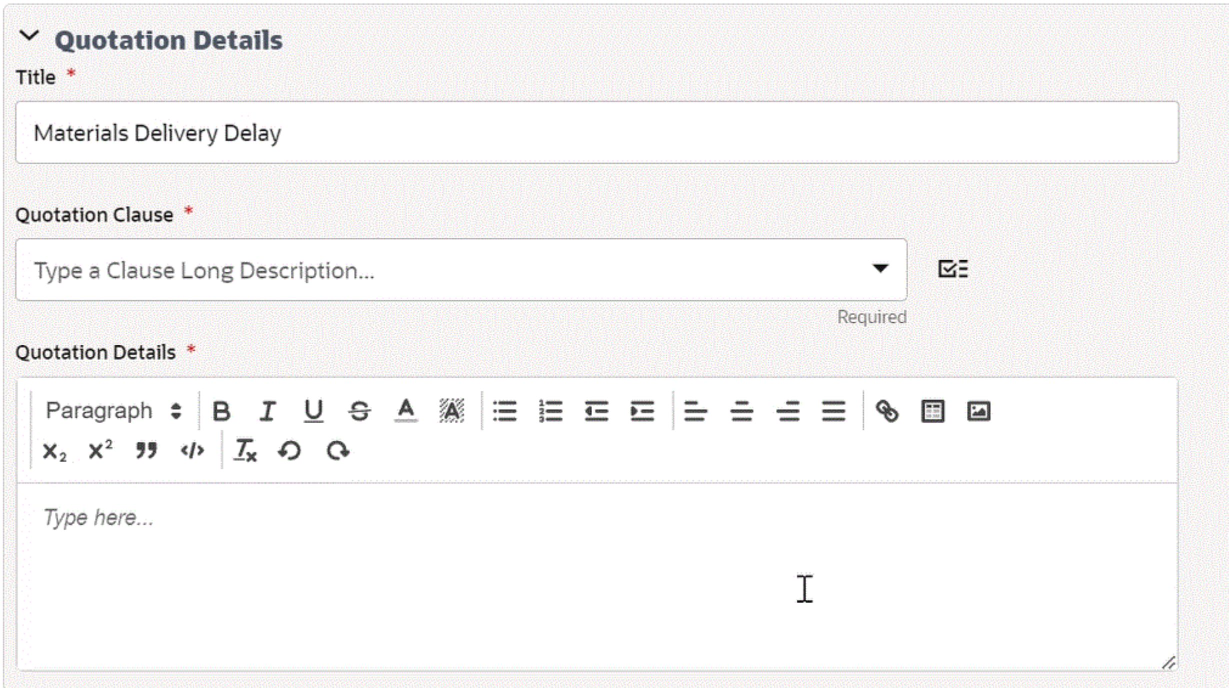
   You cannot send the form without completing the required fields.
6) Select the **clause picker** icon next to **Quotation clause** to view all clauses available for selection on this notification.
7) To populate the **Contract Financial Breakdown**, select **Reference Commit**.
8) Enter in the number of days impacted by the proposal in the **Change to the completion date** field.
9) Select the **Quotation Breakdown** tab and enter the cost line items.
10) Select **Add** to select the line item type.
11) Complete all the required fields and select **Save** to add the line item to the quotation items.

    If required, you can add multiple line items.

    > See ***Creating a Response Time Extension Notification*** for how to submit and respond to an extension of time.

12) Once you complete all fields, select **Send** to submit the quotation for internal review.

After completing an internal review, the quotation creates a task for the other party to review.



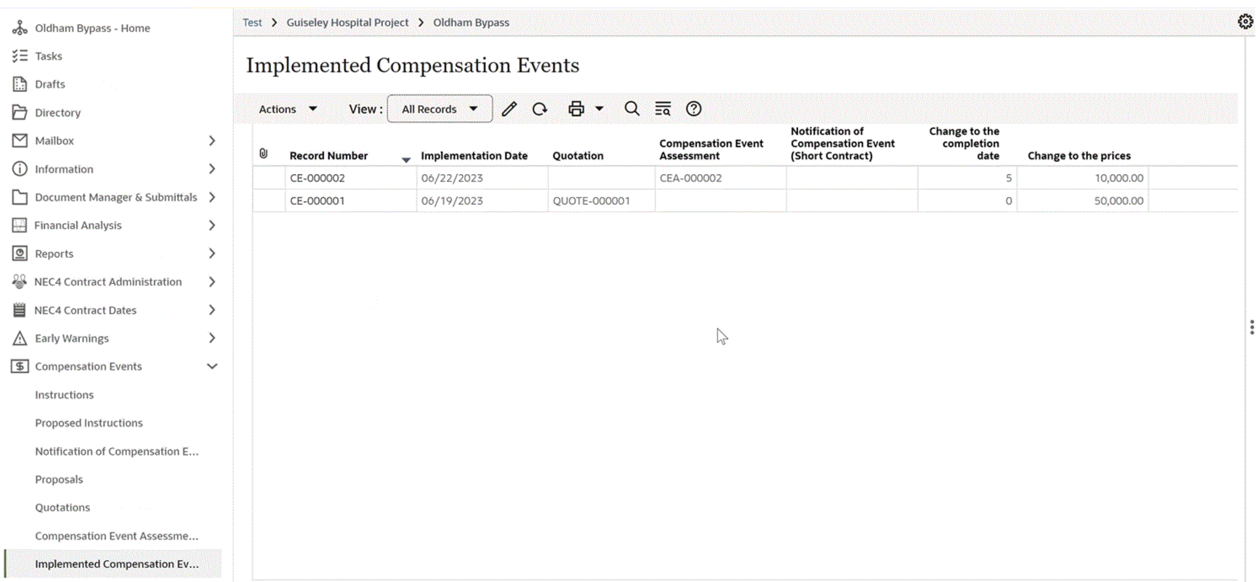
Viewing Implemented Compensation Events

The application automatically creates an implemented compensation event when someone changes the time or price in a completed compensation event workflow.

To view implemented compensation events:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Implemented Compensation Events**.

   This shows all accepted records from **Quotations**, **Compensation Event Assessments**, **Notification of Compensation Events**, and **Notification of Compensation Events (Short Contracts)**.



Submitting a Notification

Notifications include any generic messages sent in the NEC4 contract environment.

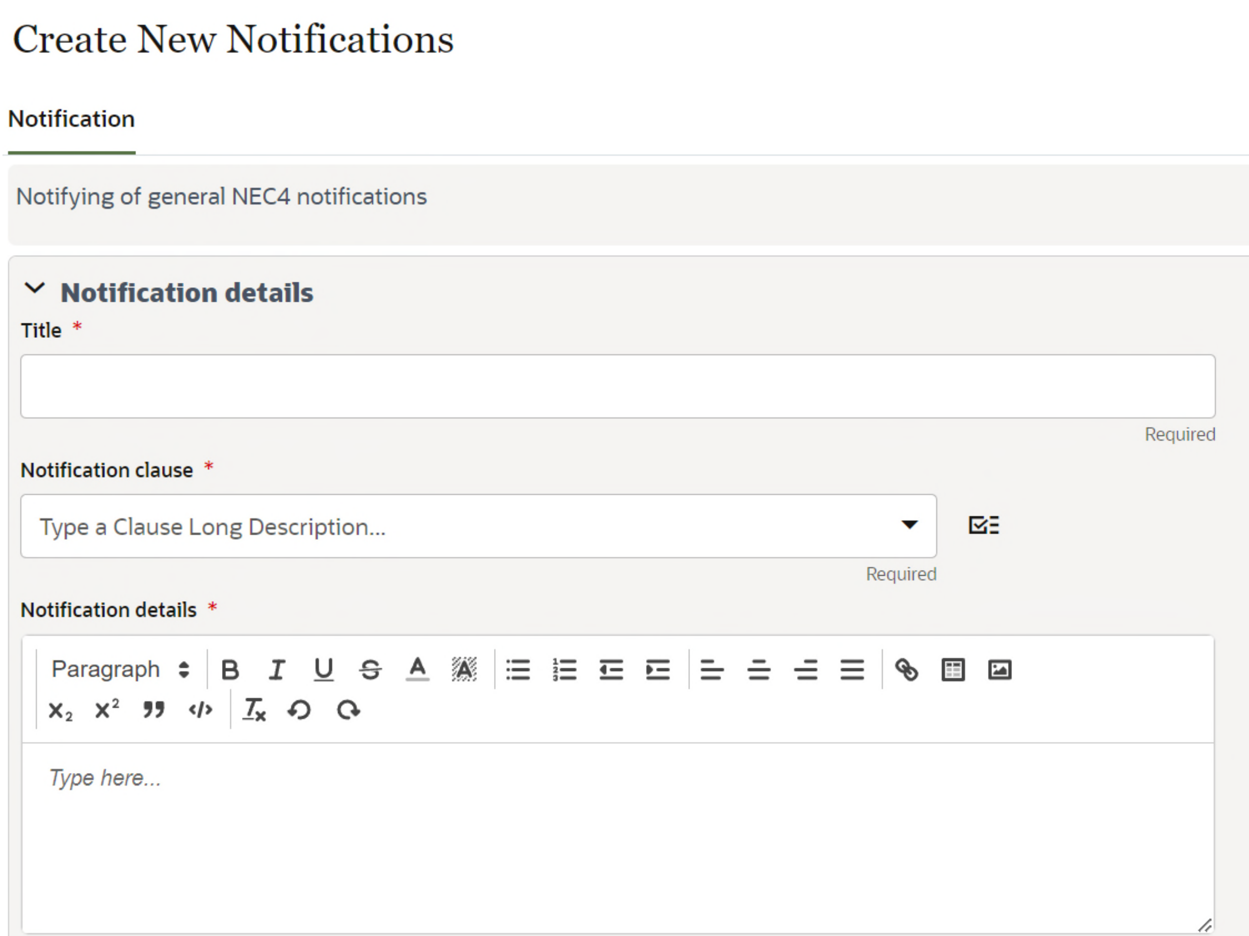
To submit a notification:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notification**, and then select **Notification**.
3) Select **Create**.

   The **Notification** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form until you complete the required fields.
5) Select the **clause picker** icon next to **Notification clause** to view all clauses available for selection on this notification.
6) Once you complete all fields, select **Send** to issue the notification.

   You can now access the notification from the left **Navigator** by selecting **Notifications**, and then selecting **Notifications.**



Submitting Other Communications

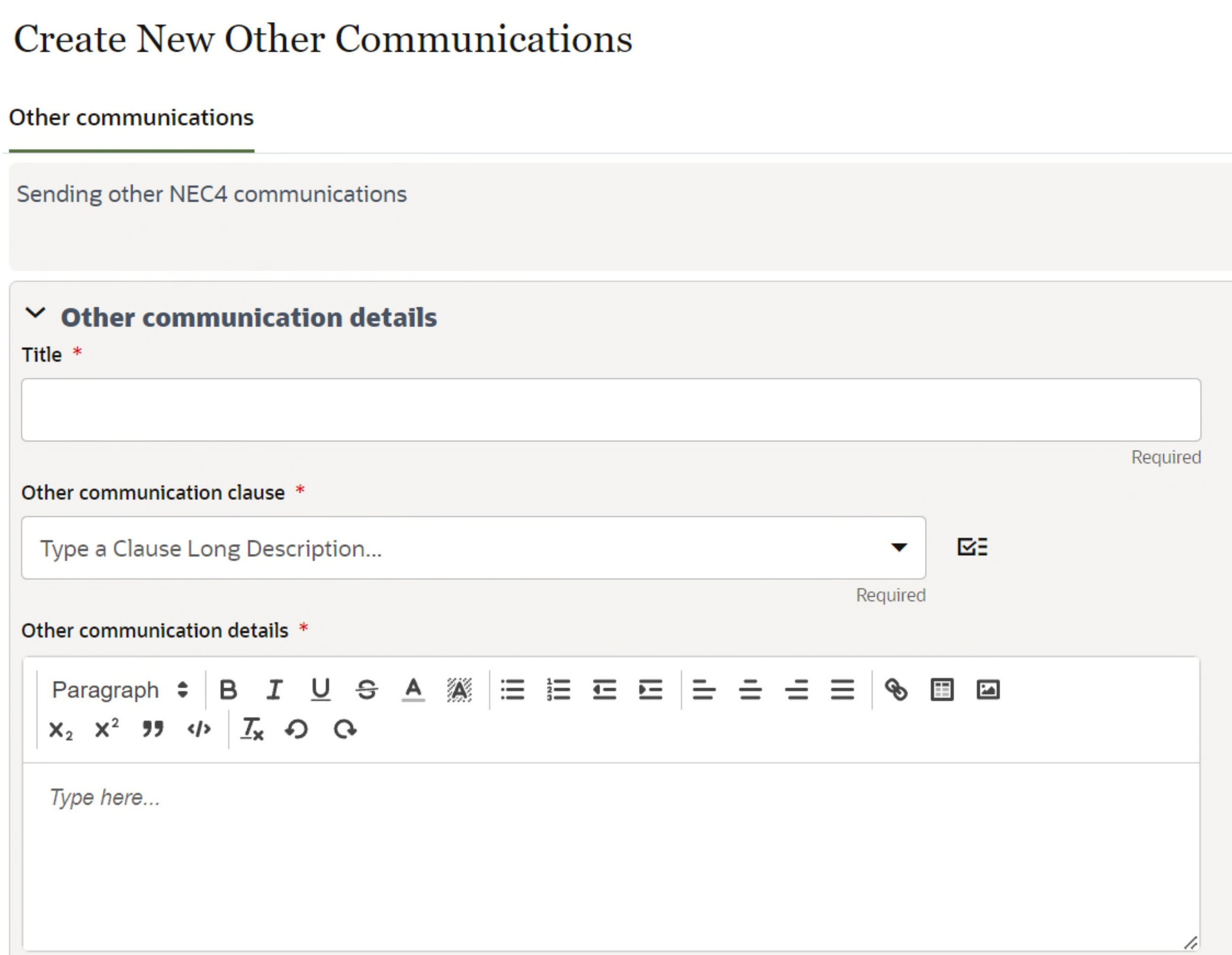
To submit other communications:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notifications**, and then select **Other Notifications**.
3) Select **Create**.

   The **Notification** form is displayed.
4) Complete all the required fields in the notification.

   You cannot submit the form without completing the required fields.
5) Select the **clause picker** icon next to **Other communication clause** to view all clauses available for selection on this notification.
6) Once you complete all the required fields, select **Send** to issue the notification.

   You can now access the notification from the left **Navigator** by selecting **Notifications**, and then selecting **Other Notifications**.



Submitting Value Engineering Proposals

To submit value engineering proposals:

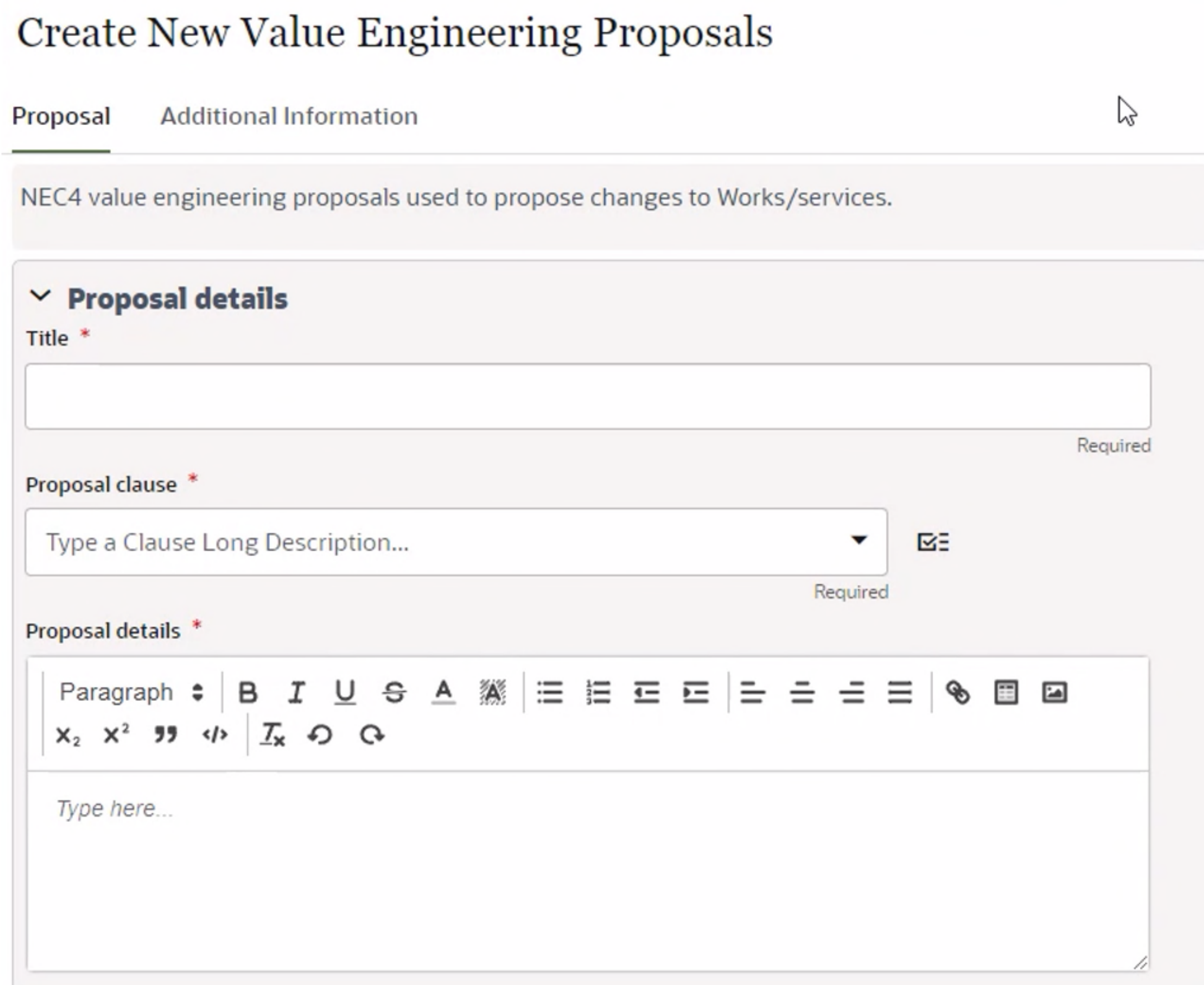
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Proposals**, and then select **Value Engineering Proposals.**
3) Select **Create**.

   The **Proposal** form is displayed.
4) Complete all the required fields.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to the **Proposal clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to add more details.
7) Select the **Actions** tab.
8) Select **Add** and complete all the required fields.

   If required, you can complete multiple line items.
9) Once you complete all the required fields, select **Send** to submit the value engineering proposal for acceptance.
   - The value engineering proposal is now available.

- A task is created for the other party to review.



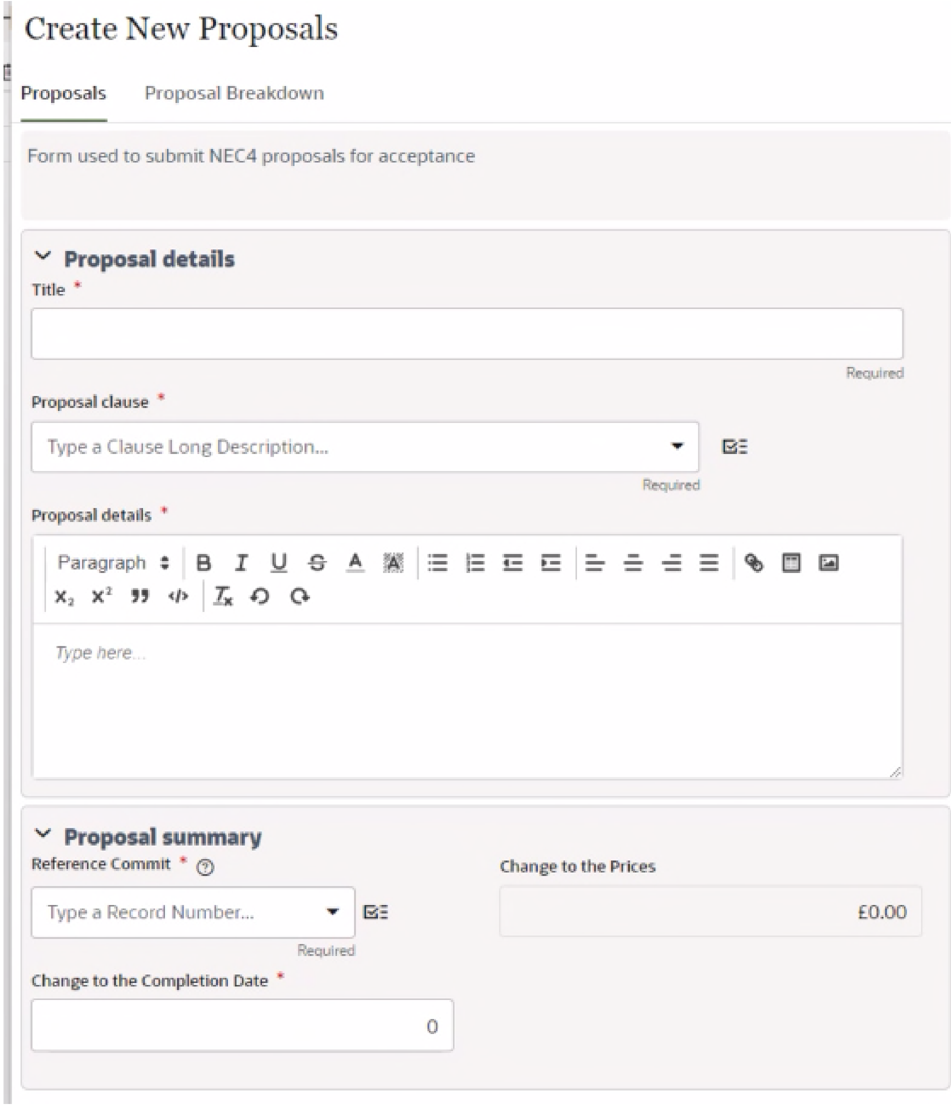
Submitting a Proposal

Proposals in the NEC4 contract environment are used to recommend changes to works or services.

To submit a proposal:

1) Navigate to a **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Proposals**.
3) Select **Create**.
   The **Proposal** form is displayed.
4) Complete all the required fields in the notification.
   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to **Proposal clause** to view all clauses available for selection on this notification.
6) In the **Change to the Completion Date** field, enter the sum of the days between the original completion date and the new expected completion date impacted by the proposal.
7) Select the **Proposal Breakdown** tab to complete the cost line items.
8) Select **Add** to choose the line item type.
9) Complete all the required fields and select **Save** to add the line item to the quotation items.
   You cannot add the line item without completing the required fields.
10) Once you complete all the required fields, select **Send** to submit the proposal for acceptance.
    - You can now access the proposal from the **Proposal Register**.

- A task is created for the other party to review.

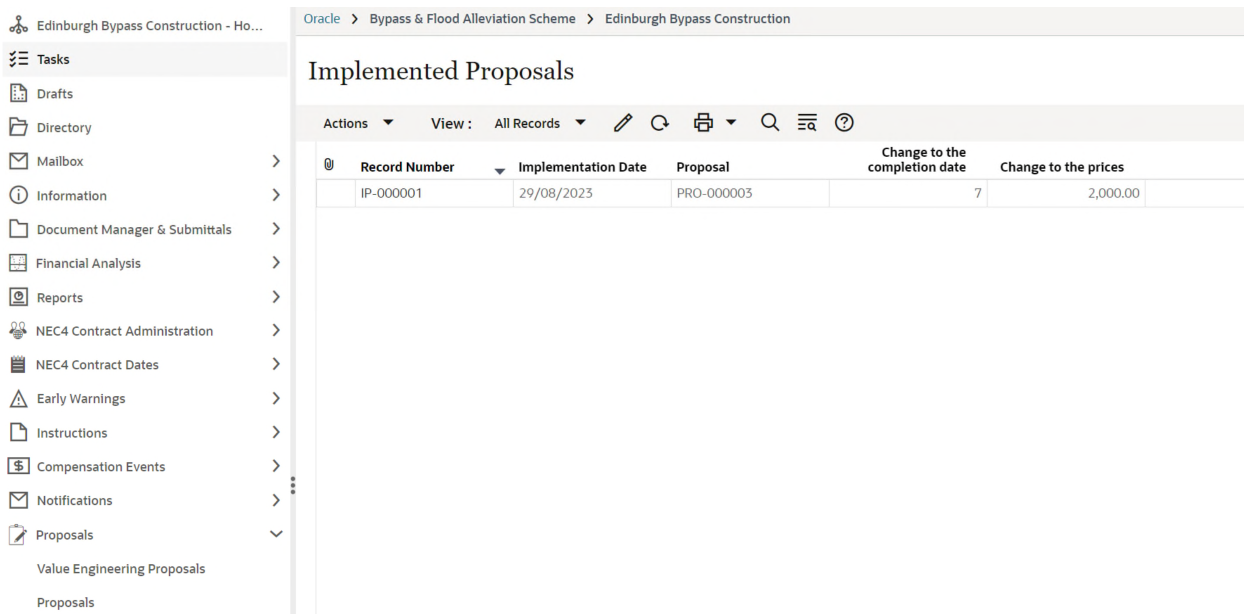


Viewing Implemented Proposals

To view implemented proposals:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Proposals**, and then select **Implemented Proposals**.

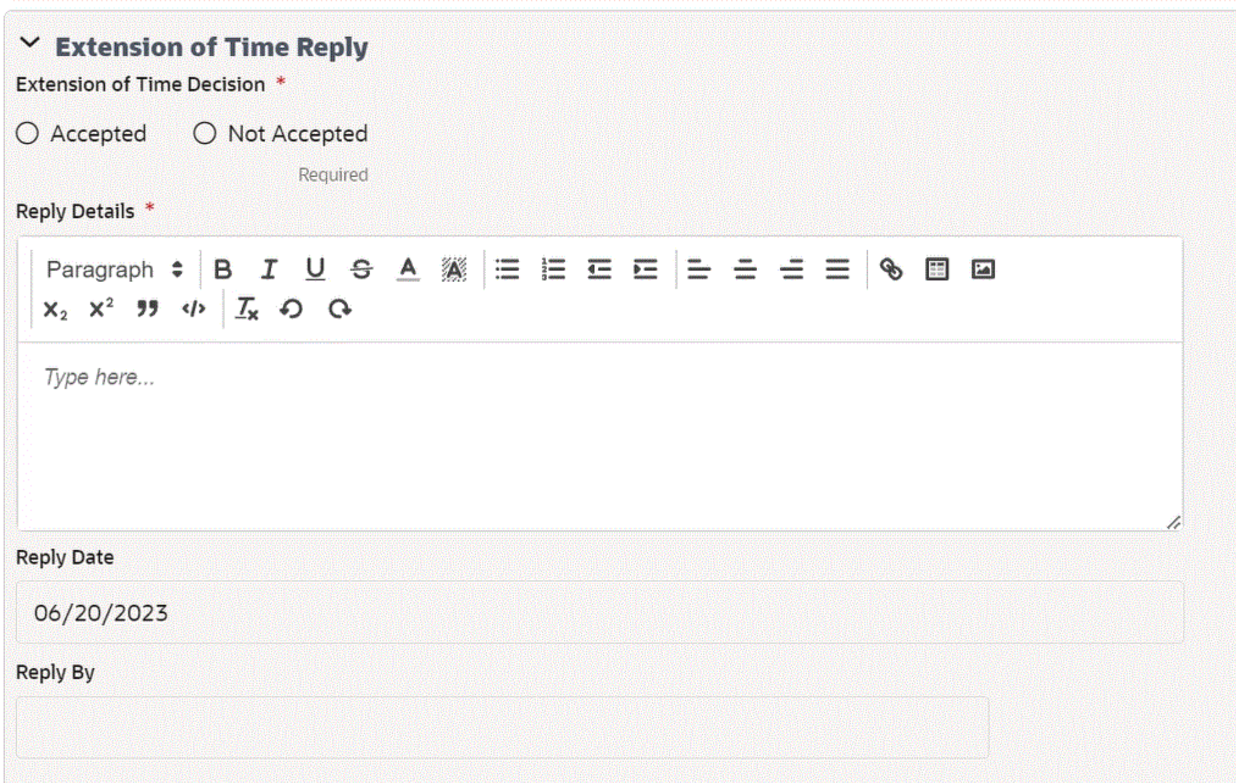
   All accepted records from your proposals are displayed.



Replying to an Extension of Time

To reply to an extension of time:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) From your **Tasks** page, select the **Time** task.
   The **Reply Form** is displayed.
4) Select **Accept**.
5) Choose an **Extension of Time Decision**.
   Either:
   - **Accepted**
   - **Not Accepted**.
6) Complete all the required fields.
   You cannot send the form without completing the required fields.
7) Select **Send** to submit the reply.



Submitting a Programme

To submit a programme:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Submissions**, and then select **Programmes**.
3) Select **Create**.

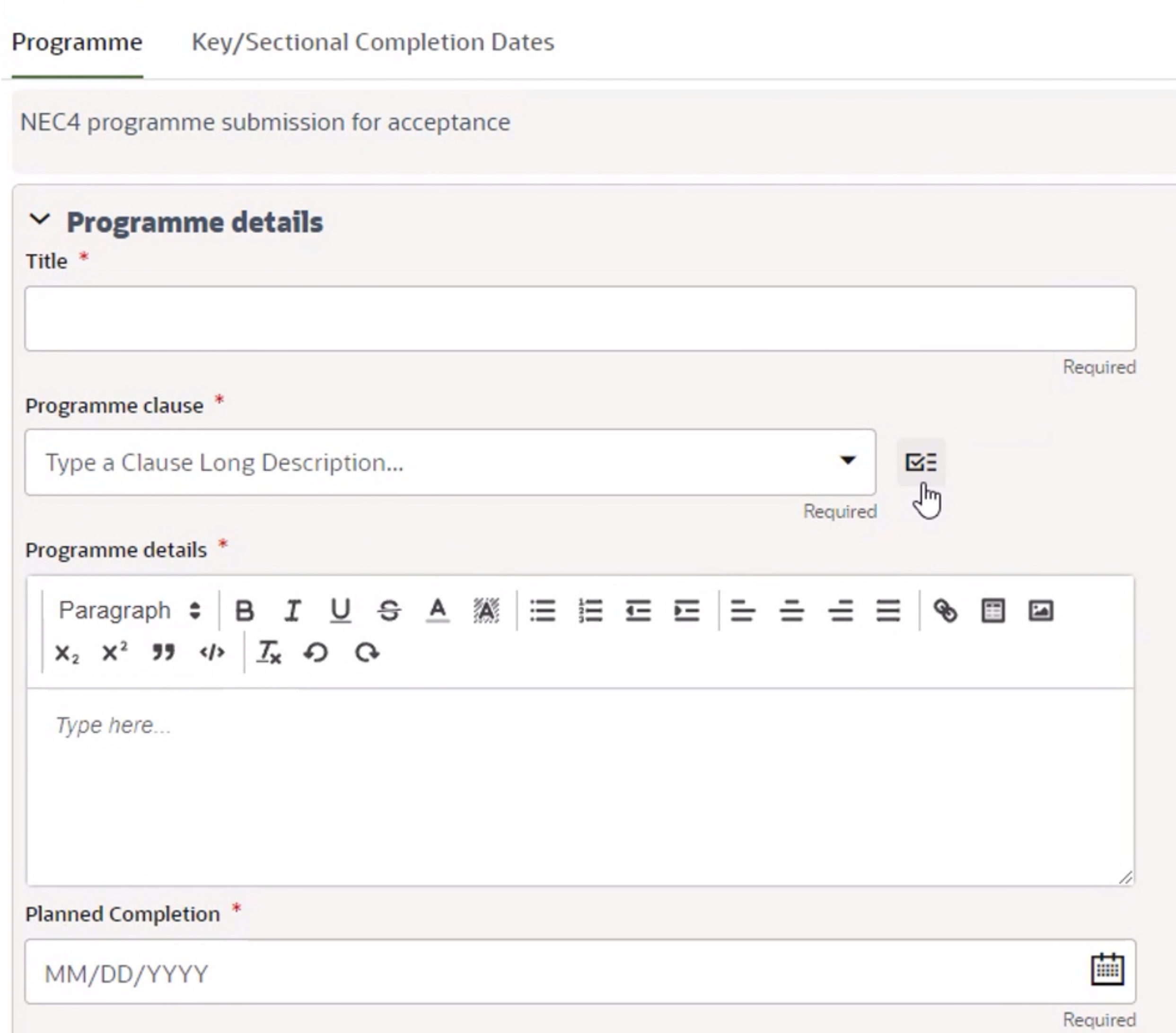
   The **Programme** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to **Programme clause** to view all clauses available for selection on this notification.

   > See ***Adding Key/Sectional Completion Dates*** for how to create a Key Section Date.

6) Once you complete all fields, select **Send** to submit the programme for acceptance.
   - You can now access the programme from the **Programme Register**.

- The application creates a task for the other party to review.



Submitting a Plan

To submit a plan:

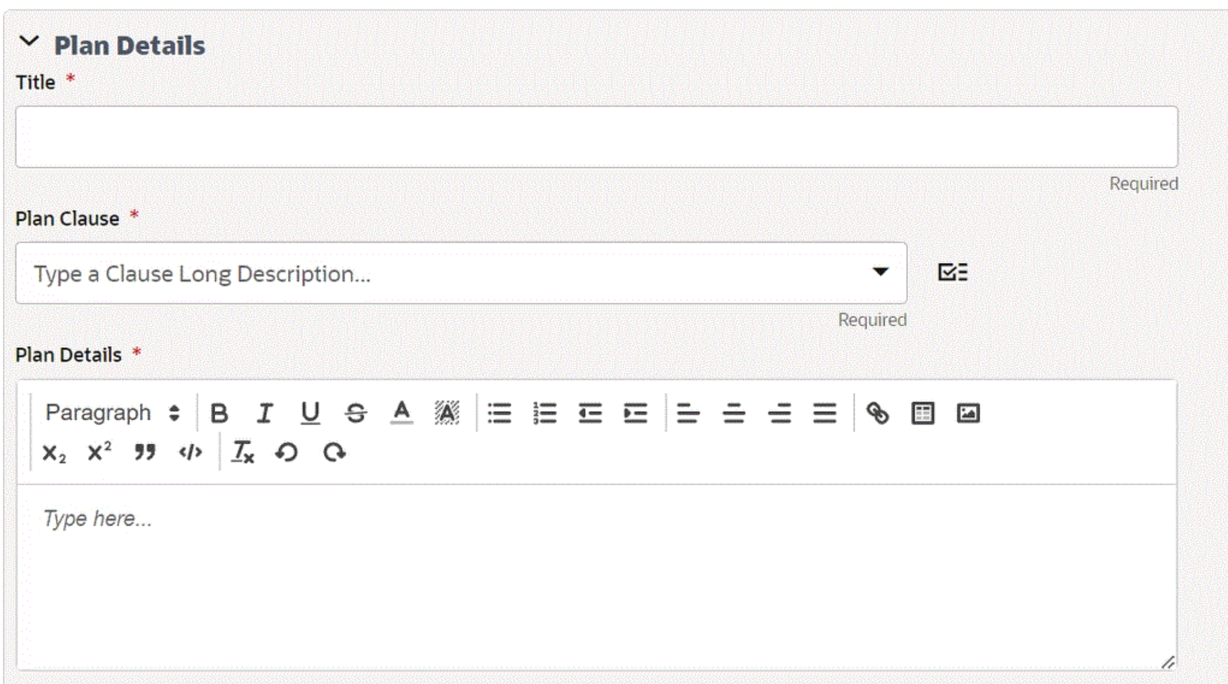
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Submissions**, and then select **Plans**.
3) Select **Create**.

   The **Plans** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to **Plan clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to enter more details.

   If required, you can add multiple line item records.
7) Once you complete all fields, select **Send** to submit the plan.

   You can now access the plan from the left **Navigator** by selecting **Submissions**, and then selecting **Plans**.



Submitting a Submission

To submit a submission:

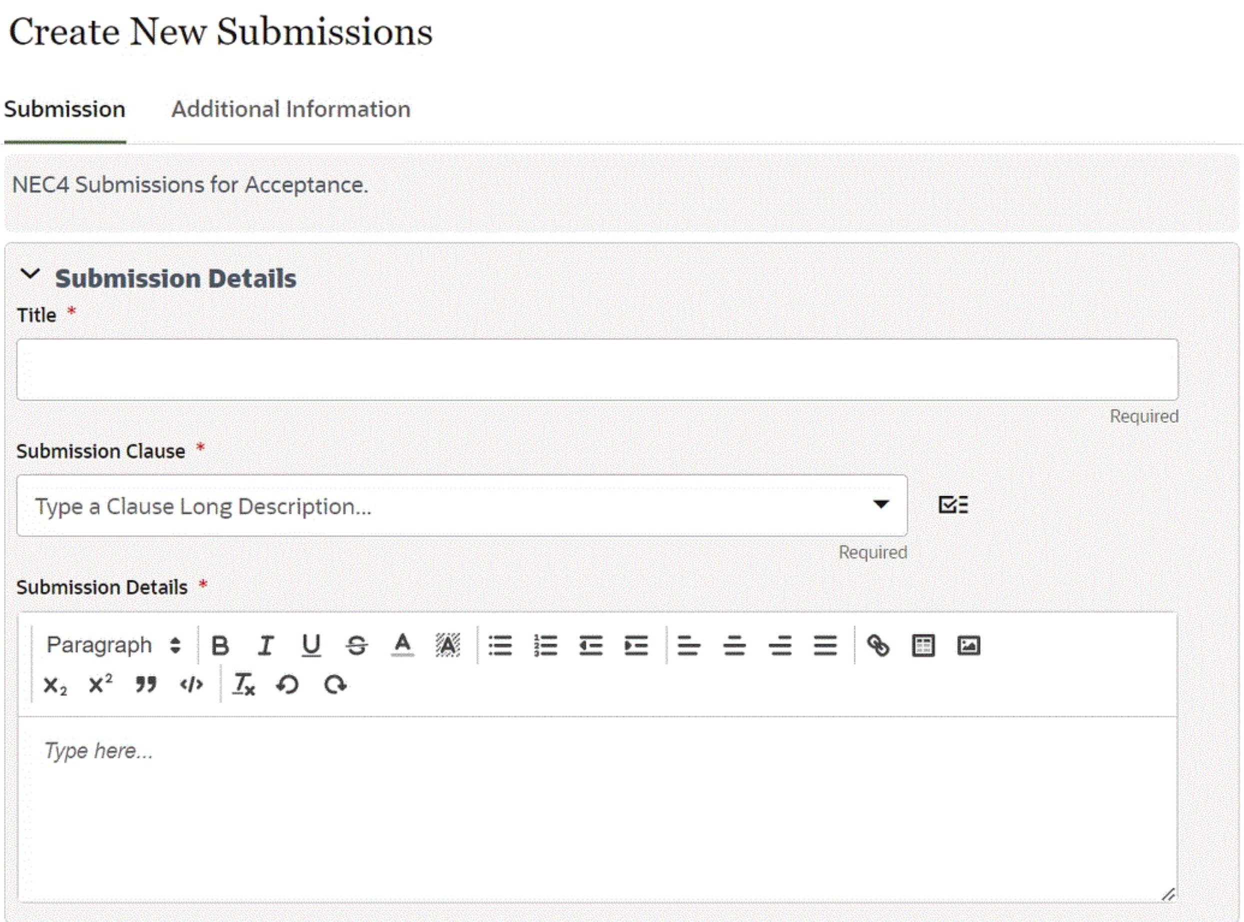
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Submissions**, and then select **Submissions**.
3) Select **Create**.

   The **Submission** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to the **Submission clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to add more details.

   If required, you can add additional line items.
7) Once you complete all fields, click **Send** to submit the submission for acceptance.
   - You can now access the plan from the **Submission Register**.

- The application creates a task for the other party to review.



Creating a Test or Inspection

Use a the **Tests and Inspections** form to log the results of a test and to send a **NEC4 Test and Inspection** notification.

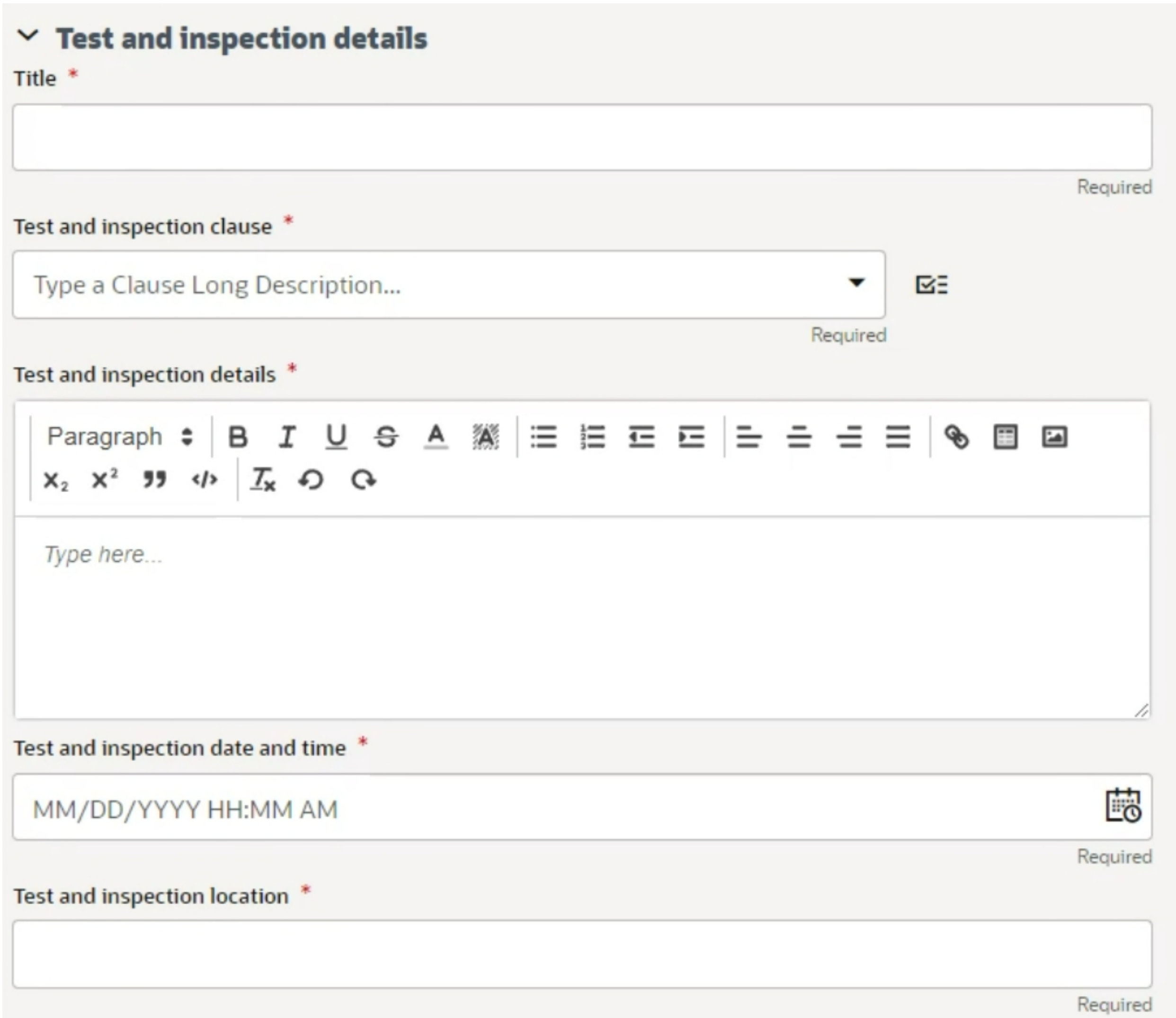
To create a test or inspection:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Tests and Inspections**.
3) Select **Create**.

   The **Inspection/Test** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to the **Test and inspection clause** to view all clauses available for selection on this notification.
6) Once you complete all fields, select **Send** to submit the test or inspection.

You can now access the test or inspection from the left **Navigator** by selecting **Quality**, and then selecting **Tests and Inspections.**



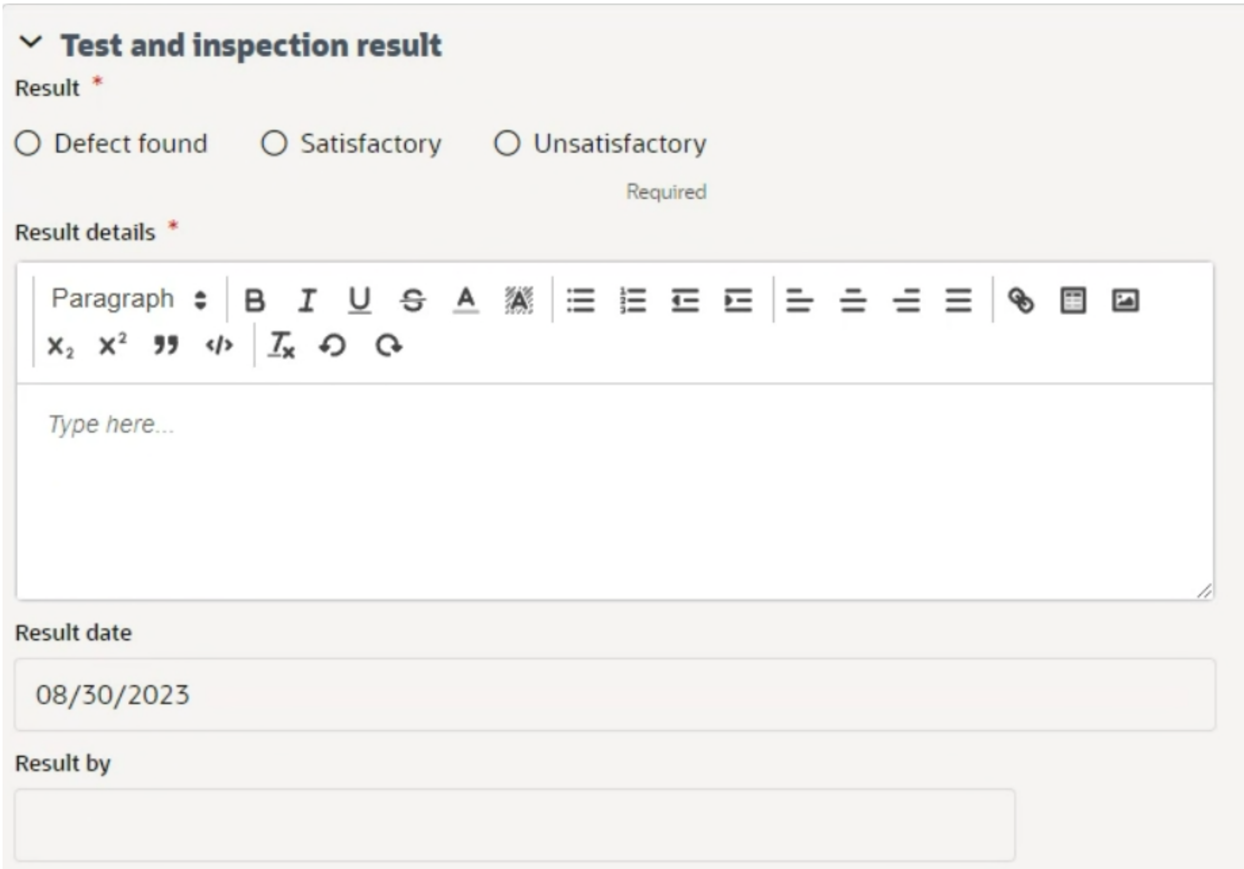
Reviewing Test and Inspection Results

To review test or inspection results:

1) Navigate to the **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) From your **Tasks** page, select the **Test/Inspection** task.
   The **Result** form is displayed.
4) Select **Accept**.
5) From the **Test and inspection result** section, select a **Result**:
   - Defect found
   - Satisfactory
   - Unsatisfactory

   If you select **Defect Found**, the application automatically creates a notification of defect.
6) Complete all the required fields.
   You cannot send the form without completing the required fields.
7) Select **Send** to submit the reply.

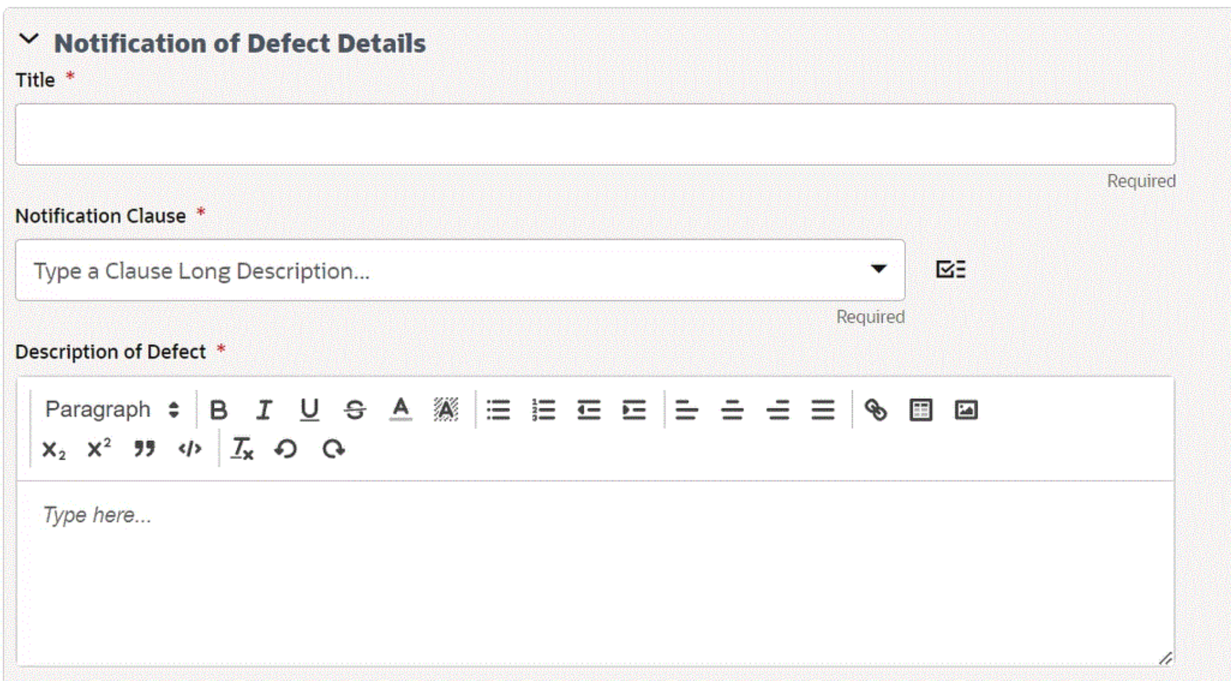
You can now access the test or inspection from the left **Navigato**r by selecting **Quality**, and then selecting **Tests and Inspections.**



Creating a Notification of Defect

To create a defect notification:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Notification of Defect**.
3) Select **Create**.
   The **Defect Notification** form is displayed.
4) Complete all the required fields in the notification.
   You cannot send the form without completing the required fields.
5) Select the **clause picker** icon next to the **Notification clause** to view all clauses available for selection on this notification.
6) Once you complete all fields, select **Send** to create a new notification of defect.
   You can now access the defect from the left **Navigator** by selecting **Quality**, and then selecting **Defect Register.**



Creating a Task Order Quotation

To create a task order quotation:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the **Task Order Quotation** task.
    - The **Quotation Form** is displayed.
    - The system automatically populates the fields in the top block.
4) Select **Accept** to interact with the record.
5) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
6) Select the **clause picker** icon next to **Task Order quotation clause** to view all clauses available for selection on this notification.
7) To complete the **Task Order Quotation Financial Breakdown**, select an option from the **Reference Commit** drop-down list.
8) Select the **Quotation Breakdown** tab.

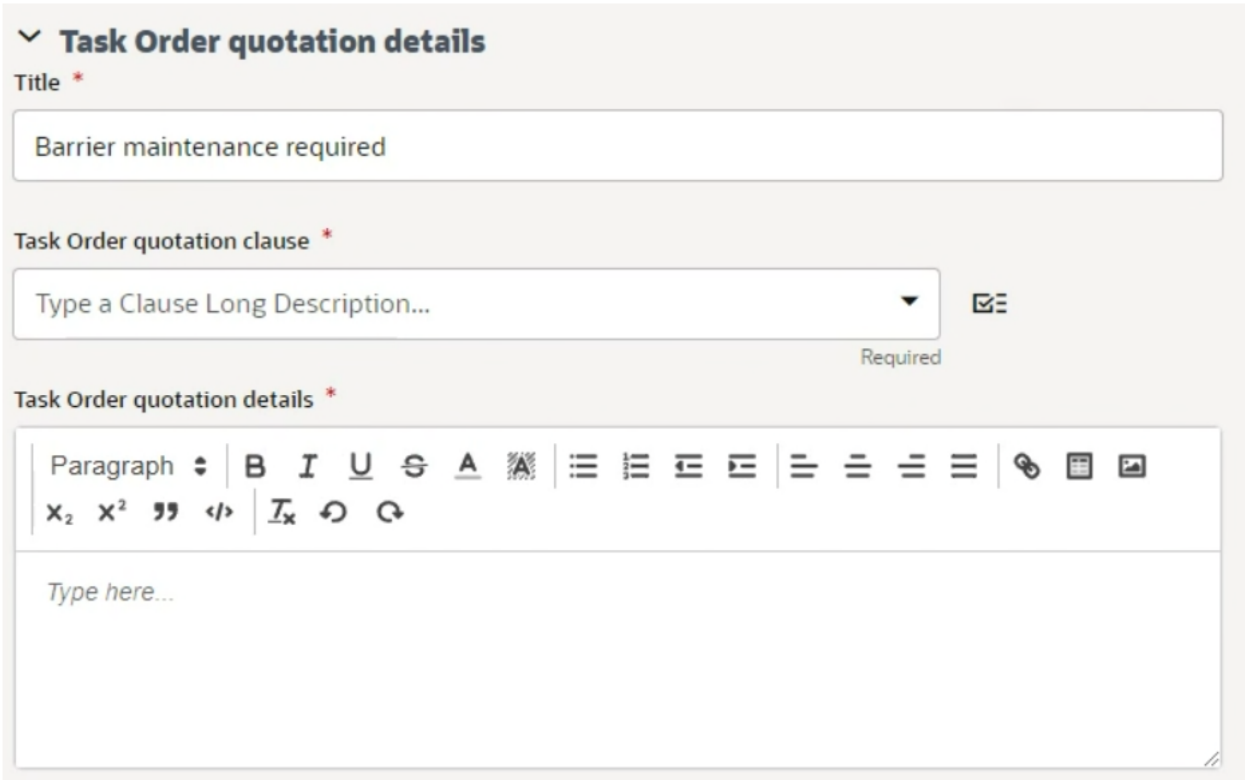
   This is where you will enter the cost line items.
9) Select **Add** to choose the **Line Item Type**.
10) Complete all the required fields and select **Save** to add the line item to the quotation items.

    If required, you can add multiple line items.

    > At the internal review step, you can request a **Response Time Extension**. See ***Creating a Response Time Extension Notification*** for how to submit and respond to an extension of time.

11) Once you complete all fields, select **Send** to submit the task order quotation for internal review.

After the internal review concludes, the application creates a task for the other party to review.



Creating a Task Order Programme

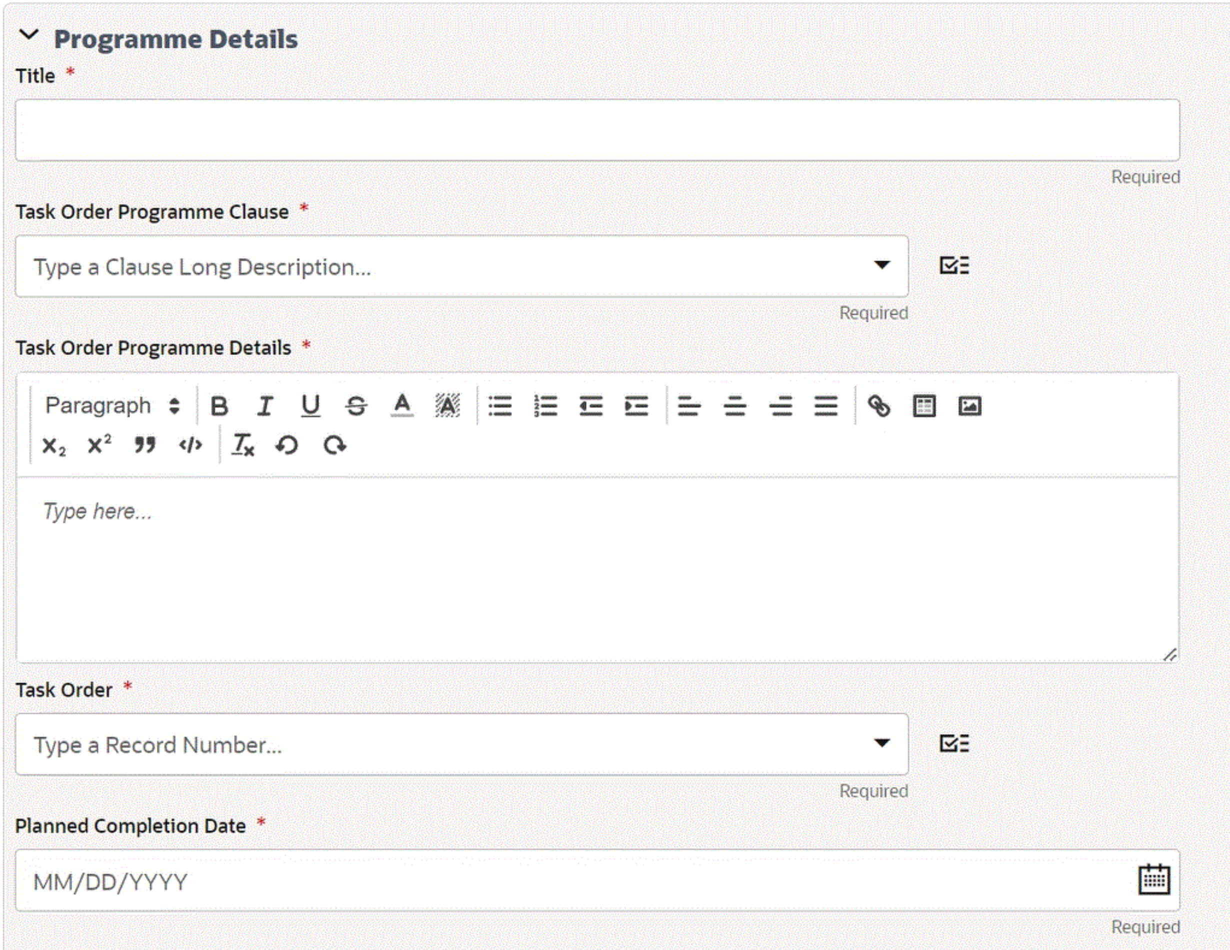
To create a task order programme:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Task Orders**, and then select **Task Order Programmes**.
3) Select **Create**.

   The **Task Order Programme** form is displayed.
4) Complete all the required fields in the notification.
   - You cannot send the form without completing the required fields.
   - Changes to the **Planned Completion Date** in the **Task Order Programme** will update the **Task Accepted Planned Completion** column in your **Task Orders**.
5) Select the **clause picker** icon next to **Task Order programme clause** to view all clauses available for selection on this notification.
6) Optional. Select the **Additional Information** tab to add more details.

   If required, you can add multiple line item records.
7) Once you complete all fields, select **Send** to submit the programme for acceptance.

You can now access the task order programme from the left **Navigator** by selecting **Orders**, and then selecting **Task Order Programmes**.



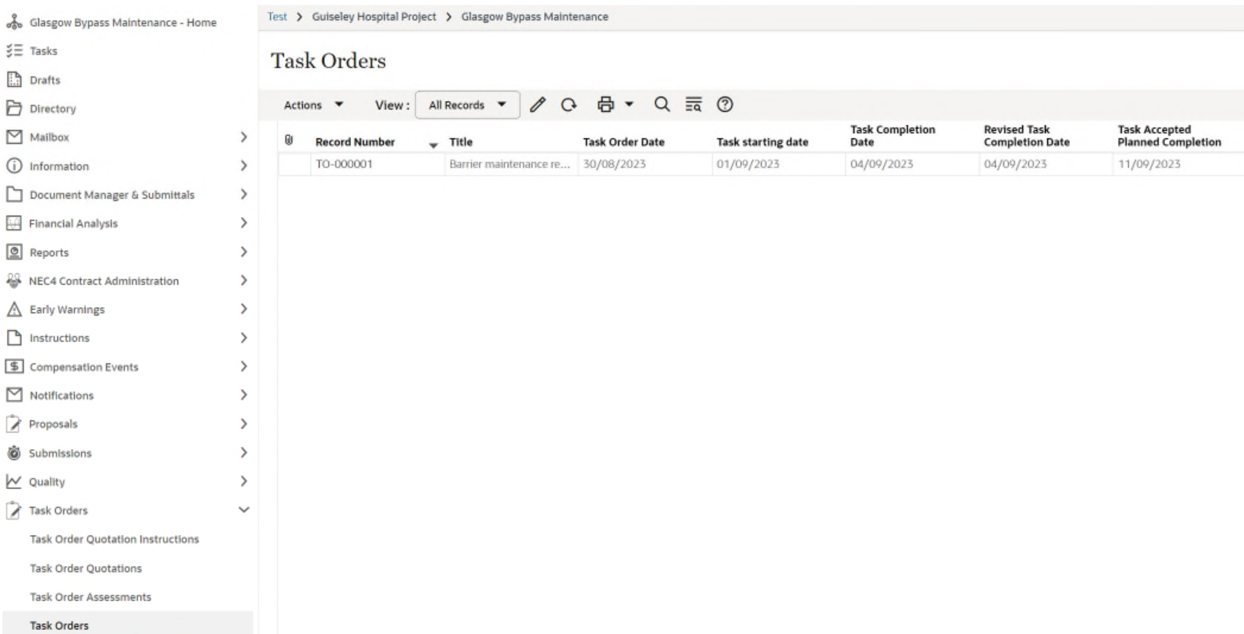
Viewing Task Orders

The application automatically creates task orders when you instruct a task order.

To view task orders:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Task Orders**, and then select **Task Orders**.

   The page lists all accepted records from **Task Order Quotations** and **Task Order Assessments**.



Updating Defined Cost

To update the defined cost:

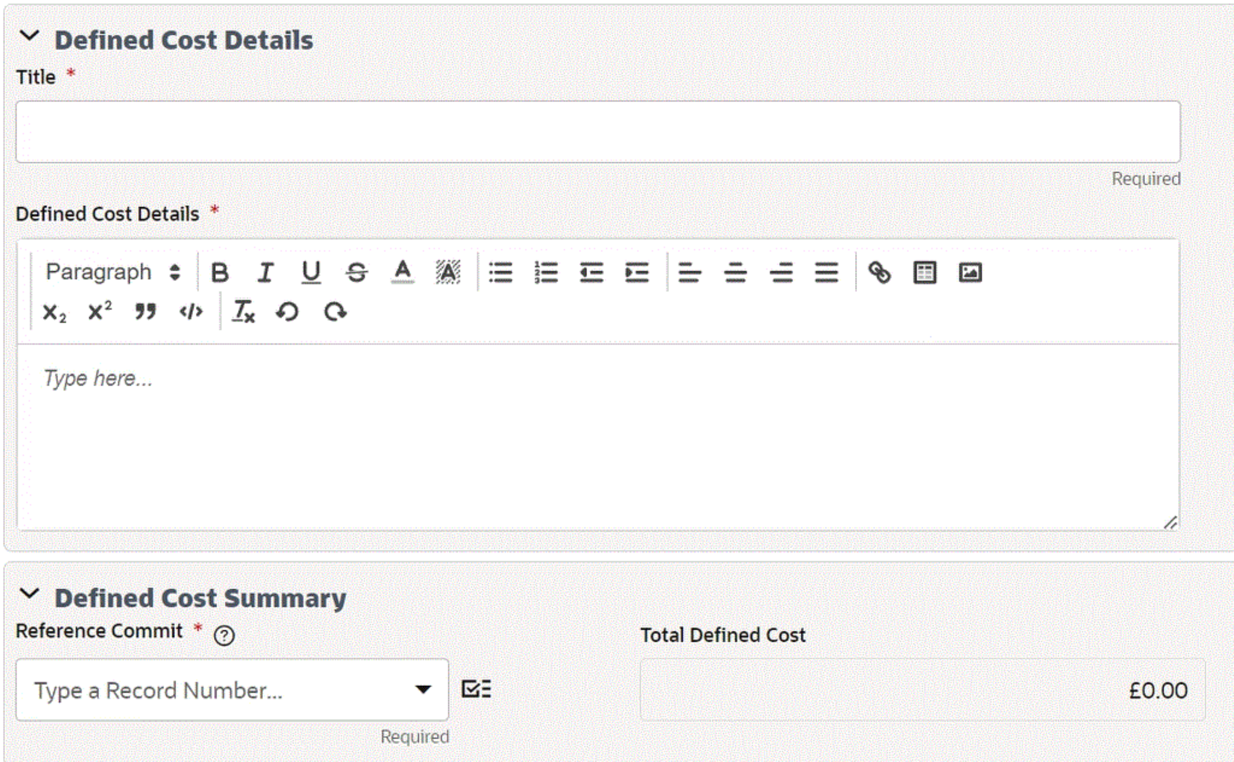
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Payments**, and then select **Defined Cost**.
3) Select **Create**.

   The **Defined Cost** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) To populate the **Defined Cost Breakdown**, select an option from the **Reference Commit** drop-down.
6) Select the **Defined Costs Breakdown** tab.

   This is where you will enter cost line items.
7) From the **Line Item Details** tab, select **Add** to select the **Line Item Type**.
8) Complete all the required fields.
   - If required, you can complete multiple line items.
   - You cannot send the form without completing the required fields.
9) Select **Save** to add the line item to the quotation items.
10) Once you complete all fields, select **Send** to submit the defined cost.
    - You can now access the defined cost from the left **Navigator** by select **Payments**, and then selecting **Defined Cost**.

- The application creates a task for the other party to review.



Updating the Forecast of Defined Cost

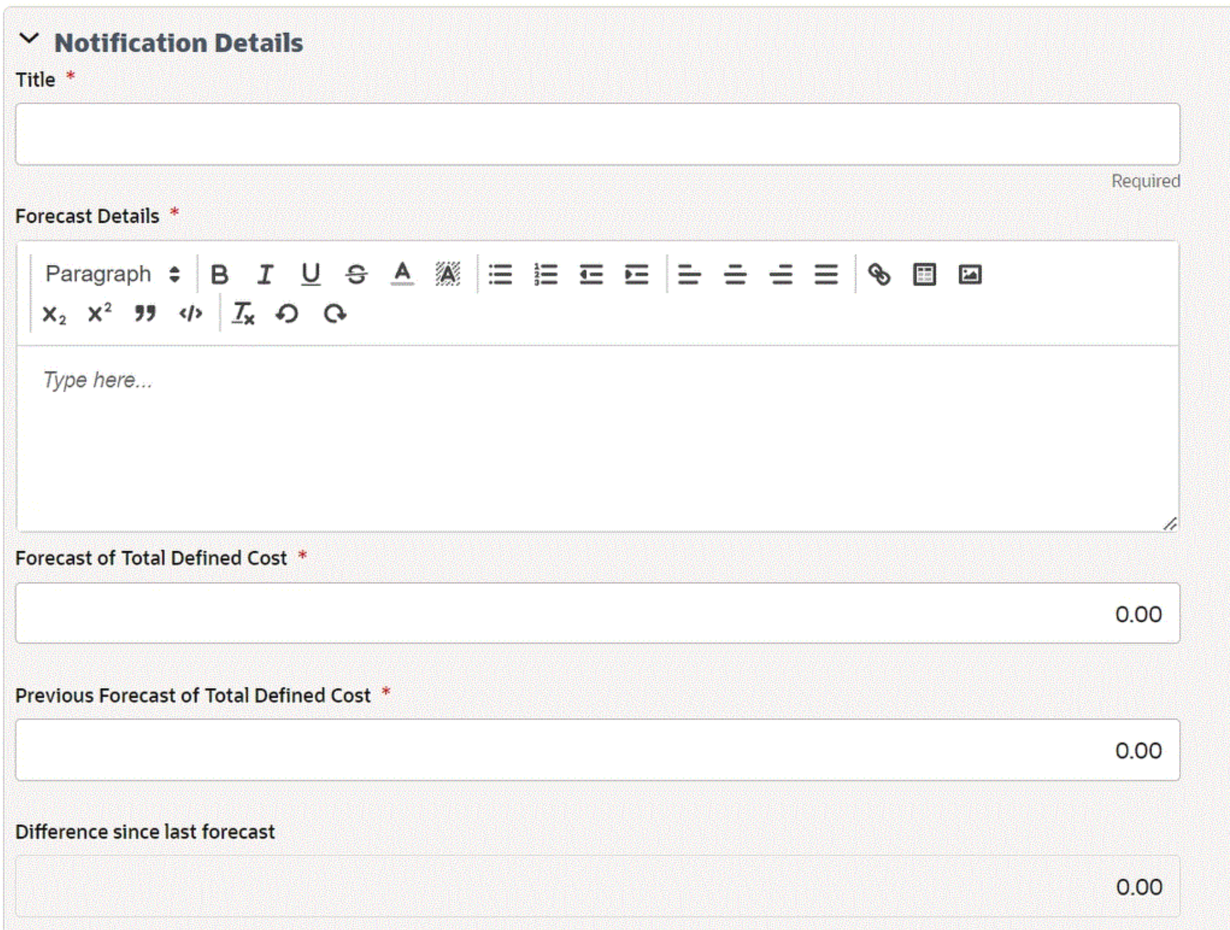
To update the forecast of defined cost:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Payments**, and then select **Forecasts of Defined Cost**.
3) Select **Create**.

   The **Forecast of Total Defined Cost** form is displayed.
4) Complete all the required fields in the notification.

   You cannot send the form without completing the required fields.
5) Once you complete all fields, select **Send** to submit the forecasts of total defined cost.

   You can now access the forecast of total defined cost from the left **Navigator** by selecting **Payments**, and then selecting **Forecasts of Total Defined Cost**.



Submitting a Payment Application

Payment applications are used for both tracking payment and certifications on the NEC4 contract.

To submit a payment application:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Payments**, and then select **Payment Applications**.
3) Select **Create**.

   The **Payment Application** form is displayed.
4) Select the **Payment Breakdown** tab and enter a breakdown for the payment application.
5) To populate the **Contract Financial Breakdown**, select an option from the **Reference Commit** drop-down.
6) Complete all the required fields.

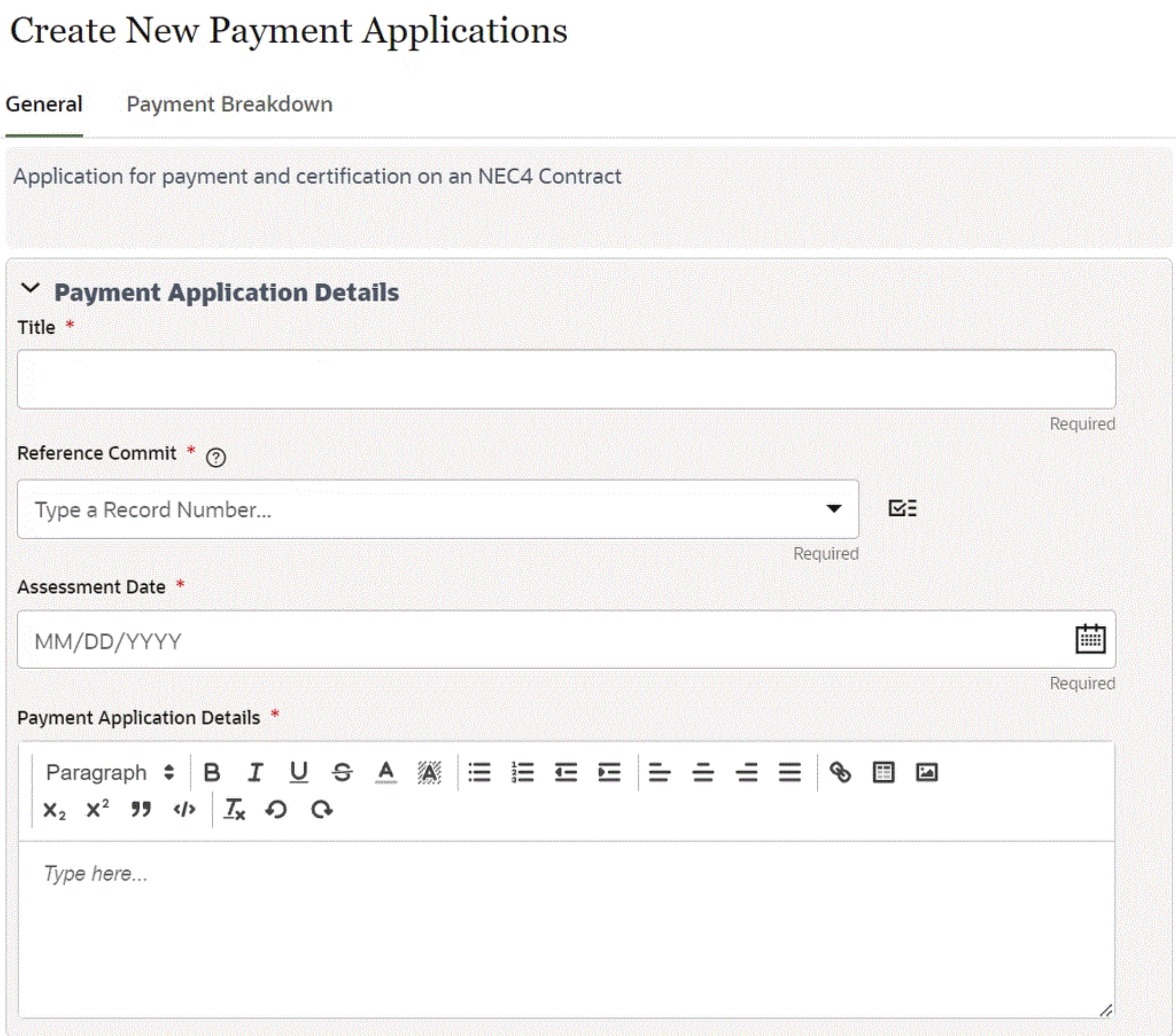
   You cannot send the form without completing the required fields.
7) From the **Payment Breakdown** tab of **Create New Payment Applications**, select **Add** to import the schedule of values.

   The **Short Description** displays the ID of each item and the **Scheduled Value** shows the approved contract value for that item.
8) In each white row, enter the **Price for Work Done to Date** for each item.

   You can also enter in any other amounts to be paid this period in the **Other amounts to date** column.
9) Enter the retainage amount to date for each item.
10) Select **Save** to save all your entered amounts.
11) When finished adding your **Price for Work Done to Date** amounts for all items, select the **Payment application** tab.

    Your changes to the amounts are now reflected in the application details.
12) Select **Send** to submit the payment application.
    - You can now access the payment application from the left **Navigator** by selecting **Payments**, and then selecting **Payment Applications**.

- The application creates a task for the other party to review.



Creating a Report

To create a report:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **NEC Reports**.
3) Select the **NEC Reports** tab and choose from the following five reports:
    - Compensation Event Register
    - Contractor Actions
    - PECC Early Warnings
    - ECC Late Actions
    - Project Manager Actions.
4) Select a template to use and select **Run Report**.

   You can choose to save or print the generated report.