Oracle
Primavera Unifier
User Guide for NEC4 Project Manager

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ORACLE®

Contents

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 project manager, service manager, or clients can work with Unifier and NEC4. It covers a range of topics, including how to submit notifications; update the pain/gain calculator; and create and reply to instructions and compensation events.

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
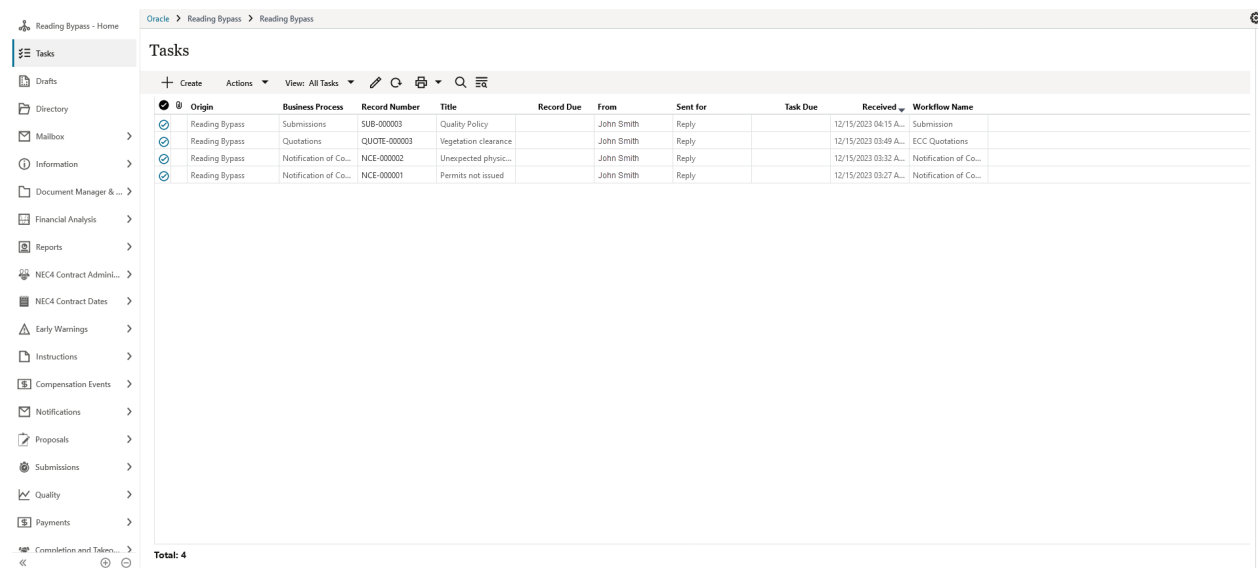
In This Section

Viewing your Tasks

To view all tasks that have been assigned to you:

1) Navigate to your **Contract Shell**.
2) Select **Tasks** from the left **Navigator**.

Adding Attachments

You can upload attachments to every notification. To upload attachments:

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 **Attachments** panel in the workflow.

Tip:

To remove an attachment, select the gear icon next to your attachment and choose **Remove**.
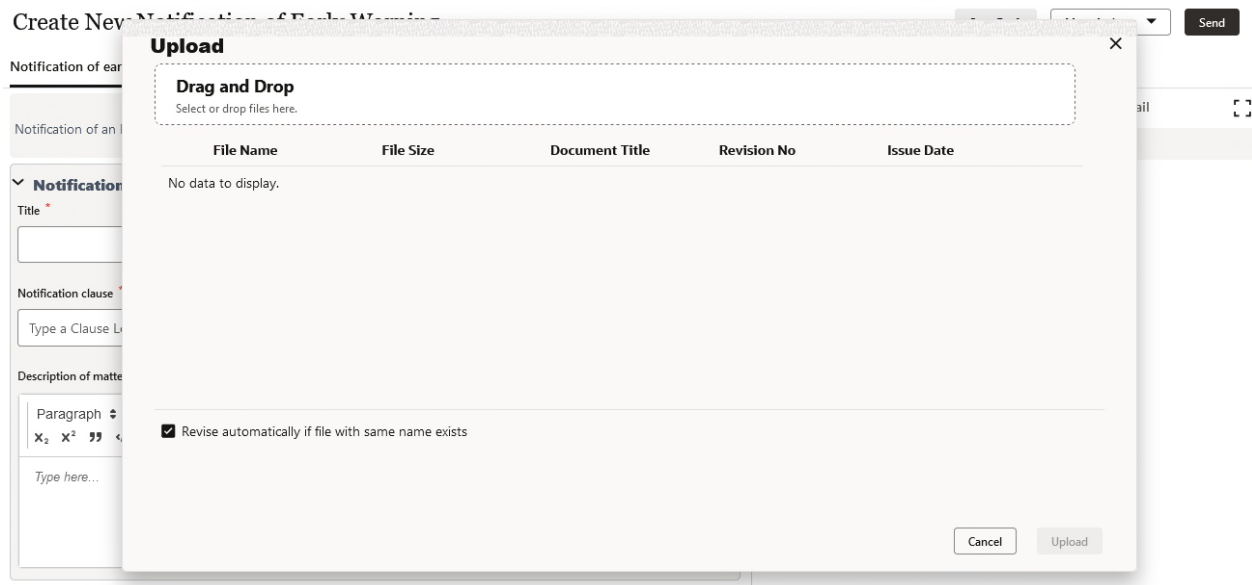
Creating a Reference Process to Link Notifications

Notifications can be linked together 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**.

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.

Line Item Details   Attachments   Linked Records

Key/Sectional Completion Date information

Key/Sectional Completion Date

Type a Description...   ▼

Planned Completion

MM/DD/YYYY   📅

Short Description *

Key/Sectional Completion Date

Cancel   Save   Save & Add New

Updating the NEC4 Contract Dashboard

The NEC4 Contract Dashboard shows the contract summary as well as bars and graphs to illustrate the contract information.

To view your contract dashboard:

1) Navigate to your **Contract Shell**.
2) From the top left corner, select the contract name.
   The dashboard defaults to the **My Dashboards** view.
3) To change the view to your **NEC4 Contract Dashboard**, select the **...** icon in the top right corner and select **NEC4 Contract**.
4) Optional. Select the **...** icon and choose **My Dashboard** to change back to the **My Dashboards** view.

My Dashboard **...** ▼

My Dashboard

NEC4 Contract

Details

Edit Dashboard

Print

Audit Log
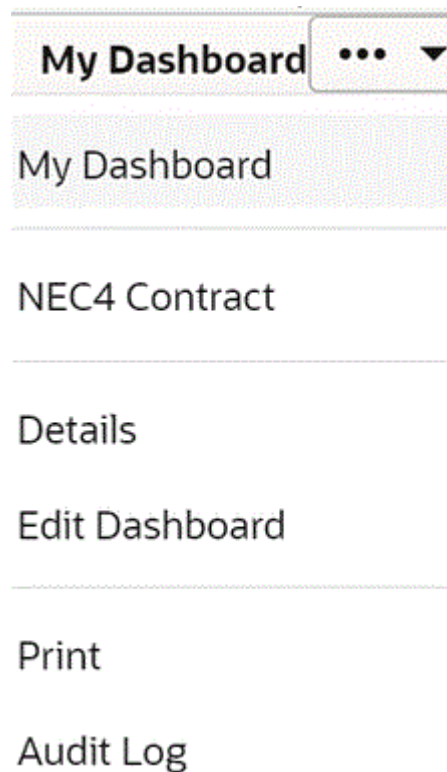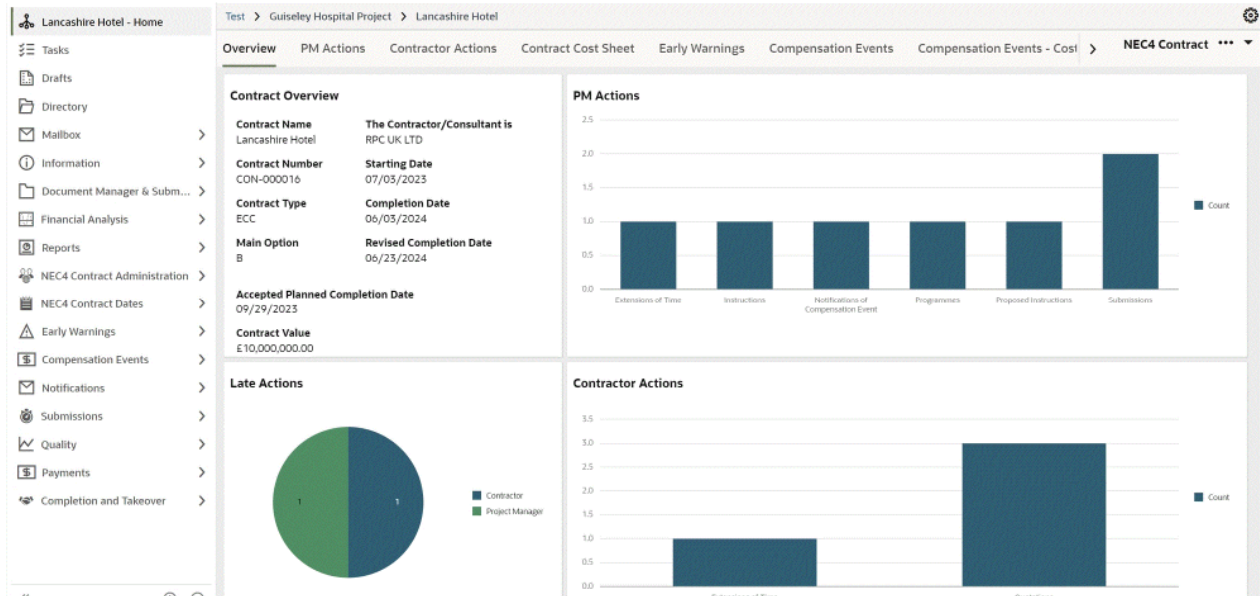
Using the Pain/Gain Calculator

To calculate NEC4 Pain/Gain Share:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Information**, and then select **General**.
3) From the **General** pane, select **Pain/Gain Calculator** to open the **Pain/Gain Calculator** form.
4) Select **Edit**.
5) Complete all the required fields in the notification, the form cannot be sent until all the required fields are filled in.
6) Select **Send** to submit the form.

Creating a Notification of Early Warning

To create a notification for an NEC4 early warning:

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 **Create New Notification of Early Warning** form is displayed.
4) Complete all the required fields in the notification, the form cannot be sent until all the required fields are filled in.
5) Select the clause picker icon next to **Notification Clause** to view all clauses available for selection on this notification.
6) For the **Matter Could** field, select the relevant options. Note, you cannot proceed until you have selected at least one option.
7) Once all fields have been filled in, select **Send**.

    ▸ The notification is now available in the **Early Warning Register** for the project manager to take action.

▸ The status is set to **Open**.

Create New Notification of Early Warning

Notification of Early Warning

Notification of an NEC4 Early Warning

⌄ **Notification of Early Warning Details**

Title *

Required

Notification Clause *

Type a Clause Long Description...   ▾   ☑≣

Required

Description of Matter *

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Updating the Early Warning Register

To update the early warning register:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Early Warnings**, and then select **Early Warning Register**.
3) Select the Early Warning record you want to update.

     The **Early Warning Register** form is displayed.

4) Select the **Edit** button.
5) Select the **Actions** tab.
6) Select **Add** and complete the required fields in the **Actions** tab. If required, you can add multiple line item records.
7) In the **Line Item Status** drop-down menu, select the proposal status (**Open** or **Closed**). The Project Manager can update the proposal status.
8) In the **Status** drop-down menu, select the early warning register status.
9) Select **Submit** to update the record with your changes.

Submit Instruction

To submit an NEC4 instruction including Notification of a Compensation Event and Quotation request:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Instructions> Instructions**.
3) Select **Create** to open the **Create New Instructions** form.
4) Complete all the required fields, the form cannot be sent until all the required fields are filled in
5) Use the **clause picker** icon to select from a list of available clauses for the following fields: **Instruction Clause, Notify compensation event**, **Compensation even type**, and **Quotation Instruction clause.**
6) Select the **Additional information** tab to add more information. If required, you can add multiple line item records.
7) Once all fields have been filled in, select **Send** to submit the instruction.
   ‣ You can now access the instruction from the left **Navigator** by selecting **Instructions**.

▶ If you selected the **Quotation is Instruction** option, a quotation task is auto-created.

Create New Instructions

Instruction   Additional Information

NEC4 Instruction including Notification of a Compensation Event and Quotation request.

⌄ **Instruction Details**

Title *

Required

Instruction Clause *

Type a Clause Long Description...   ▼   ☑≣

Required

Instruction *

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Submitting a Proposed Instruction

To submit a proposed instruction:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Proposed Instruction**.
3) Select **Create** to open the **Create New Proposed Instructions** form.
4) Complete all the required fields, the form cannot be sent until all the required fields are filled in.
5) Select the **clause picker** icon next to the **Proposal Instruction Clause** field to view the clauses available for selection on this notification.
6) Select the **Additional information** tab to add additional information. If required, you can add multiple line item records.
7) Once all fields have been filled in, select **Send** to submit the proposed instruction.
   ‣ You can now access the proposed instruction from the left **Navigator** by selecting **Proposed Instructions**.

▸ A quotation task is auto-created.

Create New Proposed Instructions

Proposed Instruction   Additional Information

NEC4 Proposed Instruction and Quotation Request.

⌄ **Proposed Instruction Details**

Title *

Required

Proposed Instruction Clause *

Type a Clause Long Description...   ▼   ☑≡

Required

Proposed Instruction *

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Assumptions

Notifying a Compensation of Event

To send a notification of an NEC4 compensation event:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Compensation Events**, and then select **Notification of Compensation Event**.
3) Select **Create** to open the **Create New Notification of Compensation Event** form.
4) Complete all the required fields, the form cannot be sent until all the required fields are filled in.
5) Use the **clause picker** icon to select from a list of available clauses for the following fields: **Notify compensation event clause**, **Compensation even type**, and **Quotation Instruction clause.**
6) Select the **Additional information** tab to add more information. If required, you can add multiple line item records.
7) Once all fields have been filled in, select **Send** to notify the compensation event.
   ‣ You can now access the notification from the left **Navigator** by selecting **Compensation Events**, and then selecting **Notification of Compensation Event**.

▸ A quotation task created for review.

Create New Notification of Compensation Event

Notification of compensation event   Additional Information

Notification of an NEC4 compensation event

⌄ Notification of compensation event details

Title *

Required

Notify compensation event clause *

| Type a Clause Long Description... ▼ | ☑≡ |

Required

Compensation event type *

| Type a Clause Long Description... ▼ | ☑≡ |

Required

Compensation event details *

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Notifying a Compensation of Event (Short Contract)

To send a notification of an NEC4 compensation event on a short form contract including quotation:

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** to open the **Create New Notification of Compensation Event (Short Contract)** form.

4) Complete all the required fields, the form cannot be sent until all the required fields are filled in.

5) Use the **clause picker** icon to select from a list of available clauses for the following fields: **Notify compensation event clause**, **Compensation even type**, **Compensation event details**, **Reference comment**, and **Quotation Instruction clause.**

6) Select the **Additional information** tab to add more information. If required, you can add multiple line item records.

7) Once all fields have been filled in, select **Send** to submit the notification.

   ‣ You can now access the notification from the left **Navigator** by selecting **Compensation Events**, and then selecting **Notification of Compensation Event (Short Contract)** .

‣ A quotation task created for review.

⌄ Notification of compensation event details

Title *

Required

Notify compensation event clause *

Type a Clause Long Description... ▼

Required

Compensation event type *

Type a Clause Long Description... ▼

Required

Compensation event details *

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⌄ Quotation details

Reference Commit * ⍰

Type a Record Number... ▼

Required

Change to the Prices

£0.00

Change to the Completion Date *

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Reply to Notification of Compensation Event

To reply to a notification of compensation event:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the notification of compensation event task from your **Tasks** page.
   The **Notification of Compensation Event** form is displayed.
4) Select **Accept** to accept the task.
5) Under the **Instruct quotation** section, select from the following options:
   ‣ **Event is a compensation event and quotation is instructed** Choose this option to instruct the quotation.
   ‣ **Quotation is not instructed** Choose this option to not accept the compensation event.
6) Complete the required fields.
7) Select the clause picker icon next to the **Quotation instruction clause** field to view the clauses available for selection
8) If you selected the option **Quotation is not instructed**, enter the reasons the quotation was not instructed.
9) Select if an early warning was given. Choose either **Yes** or **No.**
10) This step is required only if you selected the option **Yes** for step 9. Select the clause picker icon next to the **Notification of early warning** field, to select a record number.
11) This step is required only if you selected the option **No** for step 9. Choose the option **Yes** or **No** for the field: **Should the Contractor/Consultant have given an early warning notification that an experienced Contractor/Consultant have given?**
12) Once all fields have been completed, select **Send**.
   ‣ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

▸ The Notification of Compensation Event will is now available.

Notification of compensation event	Additional Information	Quotation	Response Time Extensions

⌄ Instruct quotation

Is notification a compensation event? *

○ Event is a compensation event and quotation is instructed   ○ Quotation is not instructed

Required

Reply details *

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Quotation instruction clause

Type a Clause Long Description...   ▾   ☑≡

Assumptions for quotation

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Reply to Notification of Compensation Event (Short Contract)

To reply to a notification of compensation event (short contract):

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the notification of compensation event (short contract) task from your **Tasks** page. The **Notification of Compensation Event (Short Contract)** form is displayed.
4) Select **Accept** to accept the task.
5) Select one of the following options for the **Is notification a compensation event?** field:
   ▸ **Event is a compensation event and quotation is instructed**
   ▸ **Event is a compensation event and Client will make own assessment**
   ▸ **Event is not a compensation event**
6) Complete the required fields.
7) Select the clause picker icon next to the **Reasons the event is not a compensation event** field to view the clauses available for selection. This field is required only if the **Event is not a compensation event** option was selected in step 5.
8) If you selected the option **Quotation is not instructed**, enter the reasons the quotation was not instructed.
9) Select if an early warning was given. Choose either **Yes** or **No.**
10) This step is required only if you selected the option **Yes** for step 9. Select the clause picker icon next to the **Notification of early warning** field, to select a record number.
11) This step is required only if you selected the option **No** for step 9. Choose the option **Yes** or **No** for the field: **Should the Contractor/Consultant have given an early warning notification that an experienced Contractor/Consultant have given?**
12) Once all fields have been completed, select **Send**.
    ▸ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.
    ▸ The Notification of Compensation Event (Short Contract) is created.
    ▸ If the compensation event is accepted, a task is created for the finance administrator.

> ▸ If the client is making their own assessment, a Compensation Event Assessment task is created.

In This Section

Replying to Notification of Compensation Event: Adding Financial Breakdown

If your notification of compensation event is accepted, the application auto creates a task to enter the financial breakdown.

To enter the financial breakdown for a compensation event:

1) From the left **Navigator**, select **Tasks**.
2) Select the notification of compensation event (short contract) task from your **Tasks** page. The **Notification of Compensation Event (Short Contract)** form is displayed.
3) Select **Accept** to accept the task.
4) Select the **Quotation Breakdown** tab.
5) Select a quotation line item and select the **Cost BreakDown** icon to open the cost breakdown panel.
6) Select the **Plus** icon to open the **Cost Code Picker** form.

7) Select the CBS Node which will add it to the cost breakdown panel against that line item.

8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.

9) Select **Save**.

10) Select **Send** to submit the cost breakdown.

‣ The cost sheet is automatically updated.

‣ See topics ***Notifying Response Time Extension*** and ***Replying to Response Time Extension*** for more information on how to submit and respond to extension of time.

Replying to Quotation

To reply to a quotation:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the quotation task from your **Tasks** page. The **Quotations** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Quotation decision** field, choose one of the following options: **Notification of acceptance of the quotation** or **Instruction to submit a revised quotation** or **Will be making own assessment**.
6) Complete the required fields and select **Send** to submit the reply.
   - If you accepted the quotation, the application auto creates a task for the Financial Administrator to add the cost breakdown on the accepted quote.
   - If you requested a revised quotation, the application auto creates a task for the Contractor/Consultant to submit a revised quotation.
   - If you selected to make your own assessment, the application auto creates a task for the Project Manager/Service Manager/Client to create an assessment.

Quotations

Quotation Quotation Breakdown Key/Sectional Completion Dates Extensions of Time

0

∨ **Quotation Reply**

Quotation Decision *

○ Notification of acceptance of the quotation   ○ Instruction to submit a revised quotation

○ Will be making own assessment

Required

Reply Details *

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Reply Date

06/19/2023

1)

In This Section

Replying to Quotation: Adding Financial Breakdown

If your quotation is accepted, the application auto creates a task to enter financial breakdown for the quotation.

To enter the financial breakdown for a quotation:

1) From the left **Navigator**, select **Tasks**.
2) Select the quotation task from your **Tasks** page. The **Quotations** form is displayed.
3) Select **Accept** to accept the task.
4) Select the **Quotation Breakdown** tab.
5) Select a quotation line item and select the **Cost BreakDown** icon to open the cost breakdown panel.
6) Select the **Plus** icon to open the **Cost Code Picker** form.
7) Select the CBS Node which will add it to the cost breakdown panel against that line item.

8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.

9) Select **Save**.

10) Select **Send** to submit the cost breakdown.

▸ The cost sheet is automatically updated.

▸ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

Creating a Compensation Event Assessment

To create an assessment of an NEC4 compensation event:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the compensation event task from your **Tasks** page. The **Compensation Event Assessment** form is displayed.
4) Select **Accept** to accept the task.
5) Complete the required fields. You cannot send this form without completing the required fields.
6) Select the **clause picker** icon next to the **Compensation Event Assessment Clause** field to view all clauses available for selection.
7) Select the **Assessment Breakdown** tab to begin adding the cost line items.
8) Select **Add** and choose the type of line item you want to add. The options displayed are: **Lump Sum**, **Unit Cost**, **Variable Unit Cost**, and **Modify Committed Line Item**.
9) Complete the required fields and click **Save** to add the line item to the Assessment Breakdown.
10) If required, add multiple line items by repeating steps 8 and 9.
11) Select the **Key/Sectional Completion Dates** tab to submit sectional dates. For more information, see topic *Adding Key/Sectional Completion Dates*.
12) Once all fields have been filled in, select **Send** to submit the compensation event assessment for internal review.

   ‣ Note, during the internal review stage, you can submit a Response Time Extension. For more information, see topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

   ‣ After completing the internal review stage, the system auto creates a task for the Financial Administrator to allocate costs.

˅ Compensation event assessment details

Title *

Change to scope

Compensation event assessment clause *

Type a Clause Long Description...   ▼   ☑≡

Required

Compensation event assessment details *

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˅ Assessment summary

Reference Commit ⓘ   Change to the Prices

CFB-000001   ▼   ☑≡ ✖   £0.00

Change to the Completion Date *

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In This Section

Compensation Event Assessment: Adding Financial Breakdown

To enter the financial breakdown for the compensation event assessment:

1) From the left **Navigator**, select **Tasks**.
2) Select the compensation event assessment task from your **Tasks** page.
3) Select **Accept** to accept the task.
4) Select the **Assessment Breakdown** tab.
5) Select a line item and select the **Cost BreakDown** icon to open the cost breakdown panel.
6) Select the **Plus** icon to open the **Cost Code Picker** form.

7) Select the CBS Node which will add it to the cost breakdown panel against that line item.

8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.

9) Select **Save**.

10) Select **Send** to submit the compensation event assessment for internal review.

  ‣ The cost sheet is automatically updated.

Viewing Implemented Compensation Events

An Implemented Compensation event is auto created when a compensation event workflow is completed with a change to price and/or time.

To view all accepted records from Quotations, Compensation Event Assessments, Notification of Compensation Events and Notification of Compensation Events (Short Contracts):

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

Submitting Notification

To submit general NEC4 notifications:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notifications**, and then select **Notifications**.
3) Select **Create**. The **Create a New Notifications** form is displayed.
4) Complete the required fields. You cannot send this form without completing the required fields.
5) Select the **clause picker** icon next to the **Notification Clause** field to view all clauses available for selection.
6) Select **Send** to issue the notification.

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

Create New Notifications

Notification

Notifying of general NEC4 notifications

⌄ **Notification details**

Title *

Required

Notification clause *

Type a Clause Long Description... ▼ ☑≡

Required

Notification details *

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Submitting Other Communications

To submit other NEC4 communications:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notifications**, and then select **Other Communications**.
3) Click **+ Create** to open the **Create New Other Communications** form.
4) Complete all the required fields, the form cannot be sent until all the required fields are filled in.
5) Select the **clause picker** icon next to **Other communication clause** to view all clauses available for selection on this notification.
6) Once all fields have been filled in, click **Send** to issue the notification.
   ▸ You can view the notifications from the left **Navigator** by selecting **Notifications**, and then selecting **Other Communications**.

Create New Other Communications

Other communications

Sending other NEC4 communications

∨ **Other communication details**
Title *

Required

Other communication clause *

Type a Clause Long Description... ▾   ☑≡

Required

Other communication details *

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Replying to a Value Engineering Proposal

To reply to a value engineering proposal:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the value engineering proposal task from your **Tasks** page. The **Value Engineering Proposals** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Proposal decision** field, choose one of the following options: **Proposal Accepted and Instruction to be given** or **Proposal is being considered and Proposed Instruction to** be **given** or **Proposal is not accepted**.
6) Complete the required fields and select **Send** to submit the reply.

   ‣ If the **Proposal Accepted and Instruction to be given** option is selected, then an instruction task is created for the **Project Manager/Service Manager/Client**.

   ‣ If the **Proposal is being considered and Proposed Instruction to be given** option is selected, then a proposed instruction task is created for the Project Manager/Service Manager/Client.

   ‣ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

Replying to a Proposal

To reply to a proposal:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the proposal task from your **Tasks** page. The **Proposals** form is displayed.
4) Select **Accept** to accept the task.
5) Select if you want to either accept or not accept the proposal.
6) Complete all the required fields.
7) Select **Send** to submit the reply.

   ▸ If the proposal is accepted, a task is created for the finance administrator to complete the cost breakdown.

   ▸ See topics ***Notifying Response Time Extension*** and ***Replying to Response Time Extension*** for more information on how to submit and respond to extension of time.

In This Section

Proposals: Adding Financial Breakdown

To enter the financial breakdown for a proposal:

1) From the left **Navigator**, select **Tasks**.
2) Select the proposal task from your **Tasks** page. The **Proposals** form is displayed.
3) Select **Accept** to accept the task.
4) Select the **Proposal Breakdown** tab.
5) Select a proposal line item and select the **Cost BreakDown** icon to open the cost breakdown panel.
6) Select the **+ Plus** icon to open the **Cost Code Picker** form.
7) Select the CBS Node which will add it to the cost breakdown panel against that line item.
8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.
9) Select **Save**.
10) Select **Send** to submit the cost breakdown.
    ▸ The cost sheet is automatically updated.
    ▸ See topics **Notifying Response Time Extension** and **Replying to Response Time Extension** for more information on how to submit and respond to extension of time.

Viewing Implemented Proposals

To view all accepted proposal records:

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

Notifying Response Time Extension

The option to create a response time extension is available across multiple business processes. In this topic, we will create a response time extension on a programme submission. The same instruction apply to other business processes that have the option to create response time extensions.

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Submissions> Programmes**.
3) The Programmes Reply form is displayed. All fields in the top block are auto populated by the system.
4) Select **Accept** to accept the task.
5) Select the **Response Time Extension** tab.
6) Select **Create**. The **Create New Response Time Extension** form is displayed.
7) Complete the required fields. You cannot send this form without completing the required fields.
8) Select **Send** to submit the response time extension for acceptance.

   ‣ You can now access the response time extension from the left **Navigator** by selecting **Submission**, and then selecting **Response Time Extension.**

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

Create New Response Time Extension

Response time extension

NEC4 request response time extension

⌄ **Response time extension details**

Title *

Required

Reason for response time extension request *

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Requested extension date *

DD/MM/YYYY 📅

Required

Replying to Response Time Extension

The option to reply to a response time extension is available across multiple business processes. In this topic, we used the example of replying to a response time extension on a programme submission. The same instruction apply to other business processes that have the option for response time extension.

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the response time extension task from your **Tasks** page. The **Response Time Extension** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Response time extension decision** field, choose from one of the following options: **Accepted** or **Not Accepted**.
6) Complete the required fields and select **Send** to submit the reply.

Replying to a Plan Submission

To reply to a plan submission:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the plans task from your **Tasks** page. The **Plans** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Plan submission decision** field, choose from one of the following options: **Accepted** or **Not Accepted**.
6) Complete the required fields. If you selected the **Not Accepted** option in step 5, select the clause picker next to the **Reason for not accepting plan** field to choose the reason for rejecting the plan submission.
7) Select **Send** to submit the reply.

   See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

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

Plans

Plan   Additional Information   Response Time Extensions

⌄ **Plan reply**

Plan submission decision *

○ Accepted   ○ Not accepted

<div align="center">Required</div>

Reasons for not accepting plan

Select

Reply details *

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Reply date

29/08/2023

Reply by

Replying to a Programme Submission

To reply to a programme submission:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the programme task from your **Tasks** page. The **Programmes** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Programme submission decision** field, choose from one of the following options: **Accepted** or **Not Accepted**.
6) Complete the required fields. If you selected the **Not Accepted** option in step 5, select the clause picker next to the **Reason for not accepting programme** field to choose the reason for rejecting the programme submission.
7) Select **Send** to submit the reply.

   ‣ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

▸ You can now access the programme from the left **Navigator** by selecting **Submissions**, and then selecting **Programmes**.

Programmes

Programme   Key/Sectional Completion Dates   Response Time Extensions

⌄ **Programme reply**

Programme submission decision *

◯ Accepted   ◯ Not accepted

Required

Reasons for not accepting programme

Select

Reply details *

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Reply date

29/08/2023

Reply by

Replying to a Submission

To reply to a submission:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the submission task from your **Tasks** page. The **Submissions** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Submission decision** field, choose from one of the following options: **Accepted** or **Not Accepted**.
6) Complete the required fields and select **Send** to submit the reply.

   ▸ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

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

Creating a Notification of Defect

To create a notification for an NEC4 defect:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Notification of Defect**.
3) Select **Create.** The **Create New Notification of Defect** form is displayed.
4) Complete all the required fields in the notification, the form cannot be sent until all the required fields are filled in.
5) Select the **clause picker** icon next to **Notification Clause** to view all clauses available for selection.
6) Once all fields have been filled in, select **Send** to create a notification of defect.
   ▸ You can now access the notification of defect from the left **Navigator** by selecting **Quality**, and then selecting **Defect Register**.

Creating a Task Order Quotation Instructions

To create a task order quotation instruction:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Task Order**, and then select **Task Order Quotation Instructions**.
3) Select **Create**. The **Create New Task Order Quotation Instructions** form is displayed.
4) Complete the required fields. You cannot send this form without completing the required fields.
5) Select the **clause picker** icon next to the **Task Order quotation Instruction clause** field to view all clauses available for selection.
6) Select the **Additional Information** tab to add additional line item information.
7) Select **Save & Add Now**.
8) If required, add additional line item records.
9) Select **Send** to submit the task order quotation instruction.
   ‣ You can now access the task order quotation instructions from the left **Navigator** by selecting **Task Orders**, and then selecting **Task Order Quotation Instructions**.

▸ A task order quotation is created for the other party (Contractor/Consultant).

Create New Task Order Quotation Instructions

Task Order quotation instruction   Additional Information

Instruction to submit NEC4 Task Order quotation

⌄ **Task Order quotation instruction details**

Title *

Required

Task Order quotation instruction clause *

Type a Clause Long Description...   ▼   ☑☰

Required

Task Order *

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Task starting date *

DD/MM/YYYY   🗓

Required

Task Completion Date *

DD/MM/YYYY   🗓

Required

Delay damages (per day) *

0.00

Replying to a Task Order Quotation

To reply to a task order quotation:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the task order quotation task from your **Tasks** page. The **Task Order Quotations** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Task Order Quotation decision** field, choose from one of the following options: **Notification of acceptance of the quotation and issue of the task order**, **Instruction to submit a revised quotation**, **Will be making own assessment**, **or Task will not be instructed**.
6) Complete the required fields.
7) Select **Send** to submit the reply.

   ‣ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

   ‣ If you accepted the quotation, the application auto creates a task for the Financial Administrator to add the cost breakdown on the accepted quote.

   ‣ If you requested a revised quotation, the application auto creates a task for the Contractor/Consultant to submit a revised quotation.

▸ If you selected to make your own assessment, the application auto creates a task for the Project Manager/Service Manager/Client to create an assessment.

∨ Task Order quotation reply

Task Order quotation decision *

○ Notification of acceptance of the quotation and issue of the task order

○ Instruction to submit a revised quotation   ○ Will be making own assessment

○ Task will not be instructed

Required

Task Order clause

| Type a Clause Long Description... | ▼ | ☑≡ |

Reply details *

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In This Section

Replying to a Task Order Quotation: Adding Financial Breakdown

If your quotation is accepted, the application auto creates a task to enter financial breakdown for the quotation.

To enter the financial breakdown for a quotation:

1) From the left **Navigator**, select **Tasks**.

2) Select the task order quotation task from your **Tasks** page. The **Task Order Quotations** form is displayed.

3) Select **Accept** to accept the task.

4) Select the **Quotation Breakdown** tab.

5) Select a quotation line item and select the **Cost BreakDown** icon to open the cost breakdown panel.

6) Select the **+ Plus** icon to open the **Cost Code Picker** form.

7) Select the CBS Node which will add it to the cost breakdown panel against that line item.

8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.

9) Select **Save**.

10) Select **Send** to submit the cost breakdown.

▸ The cost sheet is automatically updated.

▸ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

Submitting a Task Order Assessment

To submit an NEC4 assessment for a task order:

1) Navigate to your **Contract Shell**.
2) From the left Navigator, select **Tasks**.
3) Select the task order assessment task to open the **Task Order Assessment** form.
4) Select **Accept** to accept the task.
5) Complete the required fields. You cannot send this form without completing the required fields.
6) Select the **clause picker** icon next to the **Task Order assessment Clause** field to view all clauses available for selection.
7) Select the **Assessment Breakdown** tab to begin adding the cost line items.
8) Select **Add** and choose the type of line item you want to add. The options displayed are: **Lump Sum**, **Unit Cost**, **Variable Unit Cost**, and **Modify Committed Line Item**.
9) Complete the required fields and click **Save** to add the line item to the Assessment Breakdown.
10) If required, add multiple line items by repeating steps 8 and 9.
11) Once all fields have been filled in, select **Send** to submit the task order assessment for internal review.

    ‣ Note, during the internal review stage, you can submit a Response Time Extension. See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

- ▸ After completing the internal review stage, the system auto creates a task for the financial administrator to allocate costs.

In This Section

Task Order Assessment: Adding Financial Breakdown

If your task order assessment is accepted, the application auto creates a task to enter the financial breakdown.

To enter the financial breakdown for a task order assessment:

1) From the left **Navigator**, select **Tasks**.
2) Select the task order assessment task from your **Tasks** page. The **Task Order Assessment** form is displayed.
3) Select **Accept** to accept the task.
4) Select the **Assessment Breakdown** tab.

5) Select a quotation line item and select the **Cost BreakDown** icon to open the cost breakdown panel.

6) Select the **+ Plus** icon to open the **Cost Code Picker** form.

7) Select the CBS Node which will add it to the cost breakdown panel against that line item.

8) Enter in the amount for the selected line item that you want to allocate against the CBS Node.

9) Select **Save**.

10) Select **Send** to submit the cost breakdown.

  ▸ The cost sheet is automatically updated.

Viewing All Task Orders

To view all accepted records from Task Order Quotations and Task Order Assessment:

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

Replying to Task Order Programmes

To reply to a task order programme submission:

1) Navigate to your **Contract Shell**.
2) From the left Navigator, select **Tasks**.
3) Select the task order programme task from your **Tasks** page.

   The Reply form is displayed.
4) Click on **Accept** to accept the task.
5) Select from the option to either accept or not accept the task. Additional required fields are displayed only if you selected the **Not Accepted** option.
6) Complete the required fields and select **Send** to submit the reply.

   ▸ See topics *Notifying Response Time Extension* and *Replying to Response Time Extension* for more information on how to submit and respond to extension of time.

   ▸ You can access the Task Order Programme from the left **Navigator** by selecting **Task Orders**, and then selecting **Task Order Programmes**.

Replying to Defined Cost

To reply to a defined cost:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the defined cost task from your **Tasks** page.
   The **Defined Cost** form is displayed.
4) Select **Accept** to accept the task.
5) Choose to either accept or revise the defined cost.
6) Complete all the required fields. The form cannot be sent until all the required fields are filled in.
7) Select **Send** to submit the defined cost.
   - You can now access the defined cost from the left **Navigator** by selecting **Payments**, and then selecting **Defined Costs**.
   - The defined cost record is sent to the finance administrator to complete the cost breakdown.

In This Section

Defined Cost:

To enter the financial breakdown for a defined cost task:

1) From the left **Navigator**, select **Tasks**.
2) Select the defined cost task from your **Tasks** page. The **Defined Cost** form is displayed.
3) Select **Accept** to accept the task.
4) Select the **Defined Cost Breakdown** tab.
5) Select a defined cost line item and select the **Cost BreakDown** icon to open the cost breakdown panel.
6) Select the **+ Plus** icon to open the **Cost Code Picker** form.
7) Allocate the **Not Costed Amount**. You can allocate the amount against multiple line items.
8) Select **Save**.
9) Select **Send** to submit the cost breakdown.
   ‣ The defined cost and the cost sheet are automatically updated with the Accepted Defined Cost.
   ‣ You can now access the defined cost from the left **Navigator** by selecting **Payments**, and then selecting **Defined Costs**.

Certifying a Payment Application

To certify a payment application on an NEC4 contract:

1) From the left **Navigator**, select **Tasks**.
2) Select the payment applications task from your **Tasks** page.

    The **Payment Application** form is displayed.
3) Select **Accept** to accept the task.
4) Complete all the required fields. The form cannot be sent until all the required fields are filled in.
5) Select the **Payment Breakdown** tab to adjust the breakdown of the payment application.
6) Adjust the required fields and select **Save**.
7) Select **Send** to certify the payment application.

    You can access the payment application from the left **Navigator** by selecting **Payments**, and then selecting **Payment Applications**.

Tips:

▸ Use the formatting options available in the **Certificate Details** text box to format the text.
▸ Select the **Attachments** tab to add or remove attachments associated with this payment application. For details see topic *Adding Attachments.*

Payment Applications

Send Save

Payment application   Payment Breakdown

☐ Apply line item value of Percentage Complete to Date to costed Lines ⓘ

Row	Ref.	Code Name	Cost Code	Scheduled value	Short Description	Description	Price for Work Done to Date	Price for Work Done (this period)	Other amounts to date	Other amounts (this period)
001	1			£100,000.00	A.10	Close Out	£10,000.00	£0.00	£20,000.00	£0.0
002	1.1	Construction	01	£100,000.00	A.10	Close Out	£10,000.00	£0.00	£20,000.00	£0.0
003	2			£100,000.00	A.09	Demobilisation	£50,000.00	£0.00	£5,000.00	£0.0
004	2.1	Construction	01	£100,000.00	A.09	Demobilisation	£50,000.00	£0.00	£5,000.00	£0.0
005	3			£200,000.00	A.08	Statutory Undert...	£5,000.00	£5,000.00	£1,000.00	£1,000.0
006	3.1	Construction	01	£200,000.00	A.08	Statutory Undert...	£5,000.00	£5,000.00	£1,000.00	£1,000.0
007	4			£150,000.00	A.07	Finishes	£20,000.00	£20,000.00	£3,000.00	£3,000.0
008	4.1	Construction	01	£150,000.00	A.07	Finishes	£20,000.00	£20,000.00	£3,000.00	£3,000.0
009	5			£500,000.00	A.06	Pavement	£0.00	£0.00	£0.00	£0.0
010	5.1	Construction	01	£500,000.00	A.06	Pavement	£0.00	£0.00	£0.00	£0.0
011	6			£300,000.00	A.05	Drainage	£0.00	£0.00	£0.00	£0.0
012	6.1	Construction	01	£300,000.00	A.05	Drainage	£0.00	£0.00	£0.00	£0.0
013	7			£50,000.00	A.04	Earthworks	£0.00	£0.00	£0.00	£0.0
014	7.1	Construction	01	£50,000.00	A.04	Earthworks	£0.00	£0.00	£0.00	£0.0
TOTAL				£2,118,000.00			£85,000.00	£25,000.00	£29,000.00	£4,000.0

Total: 30

Creating a Certificate

To create the NEC4 certification of completion or takeover for contract or section:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Completion and Takeover**, and then select **Certificates**.
3) Select **Create** to open the **Create New Certificates** form.
4) Complete all the required fields. The form cannot be sent until all the required fields are filled in.

> **Note:** For the **Certificate Type** field, an additional required field (**Key/Sectional Completion Date)** is displayed if you selected either the **Sectional completion** or the **Sectional takeover** option.

5) Select the **clause picker** icon next to the **Certificate Clause** field to view all clauses available for selection.
6) Once all fields have been filled in, select **Send** to submit the certificate.
   ▸ You can access the certificate from the left **Navigator** by selecting **Completion and Takeover**, and then selecting **Certificates**.

‣ The updated **Certified Completion Date** is displayed on the dashboard.

Create New Certificates

Certificate
_____

NEC4 certification of completion or takeover for contract or section

⌄ **Certificate details**

Title *

[   ]

Required

Certificate clause *

[Type a Clause Long Description...   ▼]   ☑≡

Required

Certificate type *

○ Completion   ○ Sectional completion   ○ Takeover   ○ Sectional takeover

Required

Key/Sectional Completion Date

[Type a Description...   ▼]   ☑≡

Certificate details *

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Certified date *

[DD/MM/YYYY   📅]

Required

Replying to Key/Sectional Completion Dates

To reply to key/sectional completion dates:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select the Programme task from your **Tasks** page.
   The **Programmes** form is displayed.
4) Select **Accept** to accept the task.
5) Select if you want to either accept or not accept the programme submission decision. Additional required fields are displayed only if you selected the **Not Accepted** option.
6) Complete the required fields.
7) Select the **clause picker** icon next to the **Reasons for not accepting programme** field to choose a reason for not accepting the programme.
8) Select **Send** to submit the reply.
9) Select the **Key/Sectional Completion Dates** tab.
   If the Programme is accepted the Planned Completion Date will change.
10) Once all fields have been filled in, select **Send**.

   ▸ The **Accepted Planned Completion Date** is updated through the Programme Business Process (BP).

   ▸ You can access the Programme from the left **Navigator** by selecting **Submissions**, and then selecting **Programmes**.

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.