Oracle
Primavera Unifier
User Guide for NEC4 Supervisor

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Oracle Primavera Unifier User Guide for NEC4 Supervisor

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Primary Author: Oracle Corporation

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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 a supervisor can work with Unifier and NEC4 and covers a range of topics, including how to create search instructions, test and inspection forms, and defect notifications.

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.

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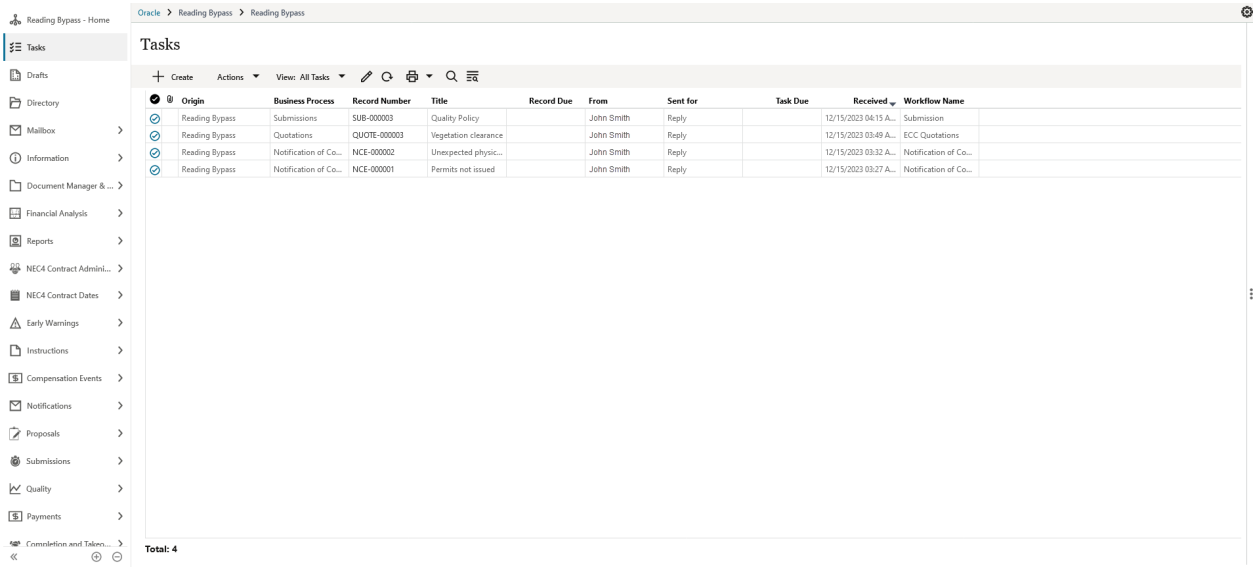
Viewing Your Tasks

To view tasks assigned to you:

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



Adding Attachments to Notifications

You can upload attachments to every notification.

To add an attachment:

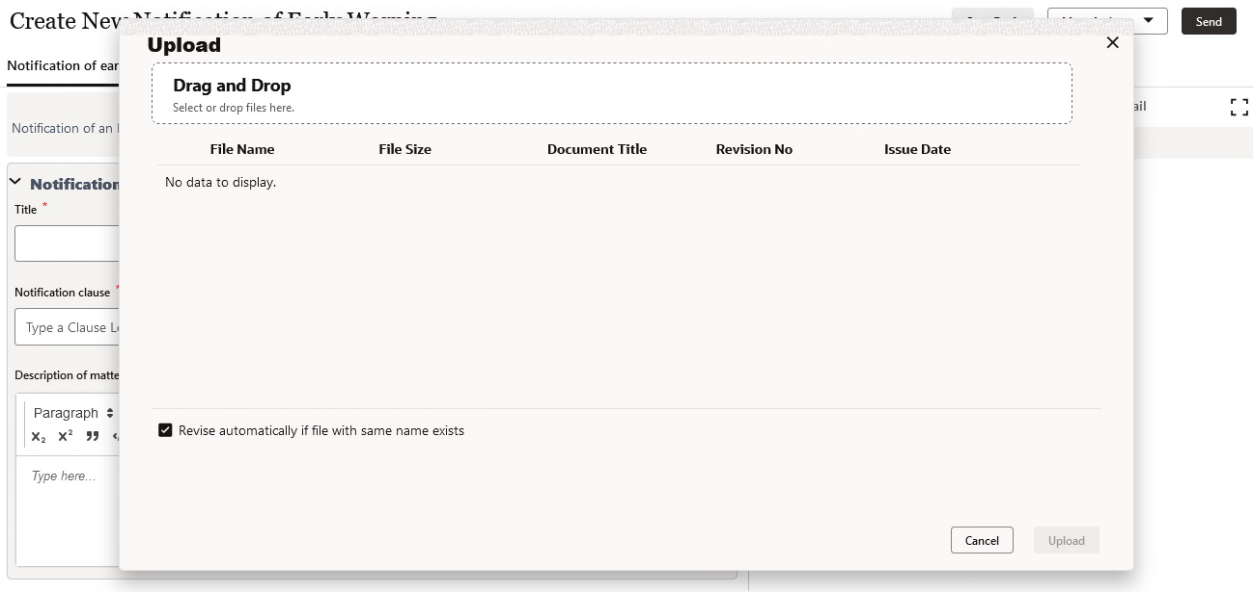
1) Select the **Attachments** tab.
2) From the **Attachments** panel, select the **paper clip** icon.
3) Either:
   - Drag and drop files

- Use the **Browse** button to find a file.

4) After adding your files, select **Upload**.
   All added attachments are added to the **Attachments** panel the workflow.

Tip:

To remove an attachment, select the gear icon next to your attachment and choose **Remove**.



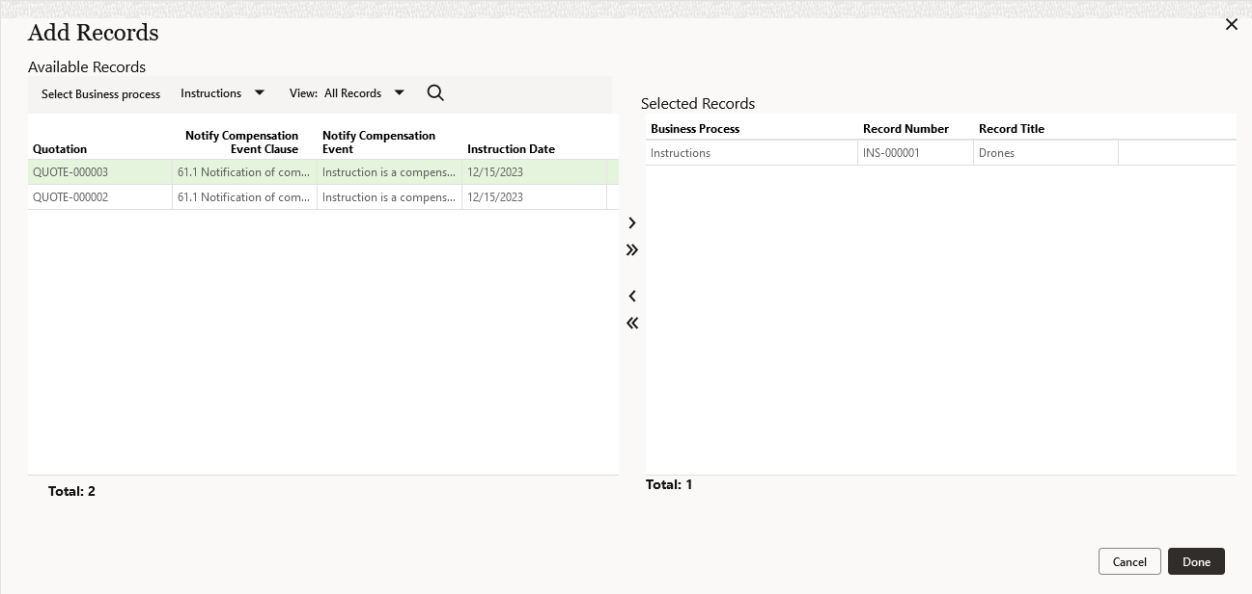
Creating a Reference Process to Link Notifications

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**.

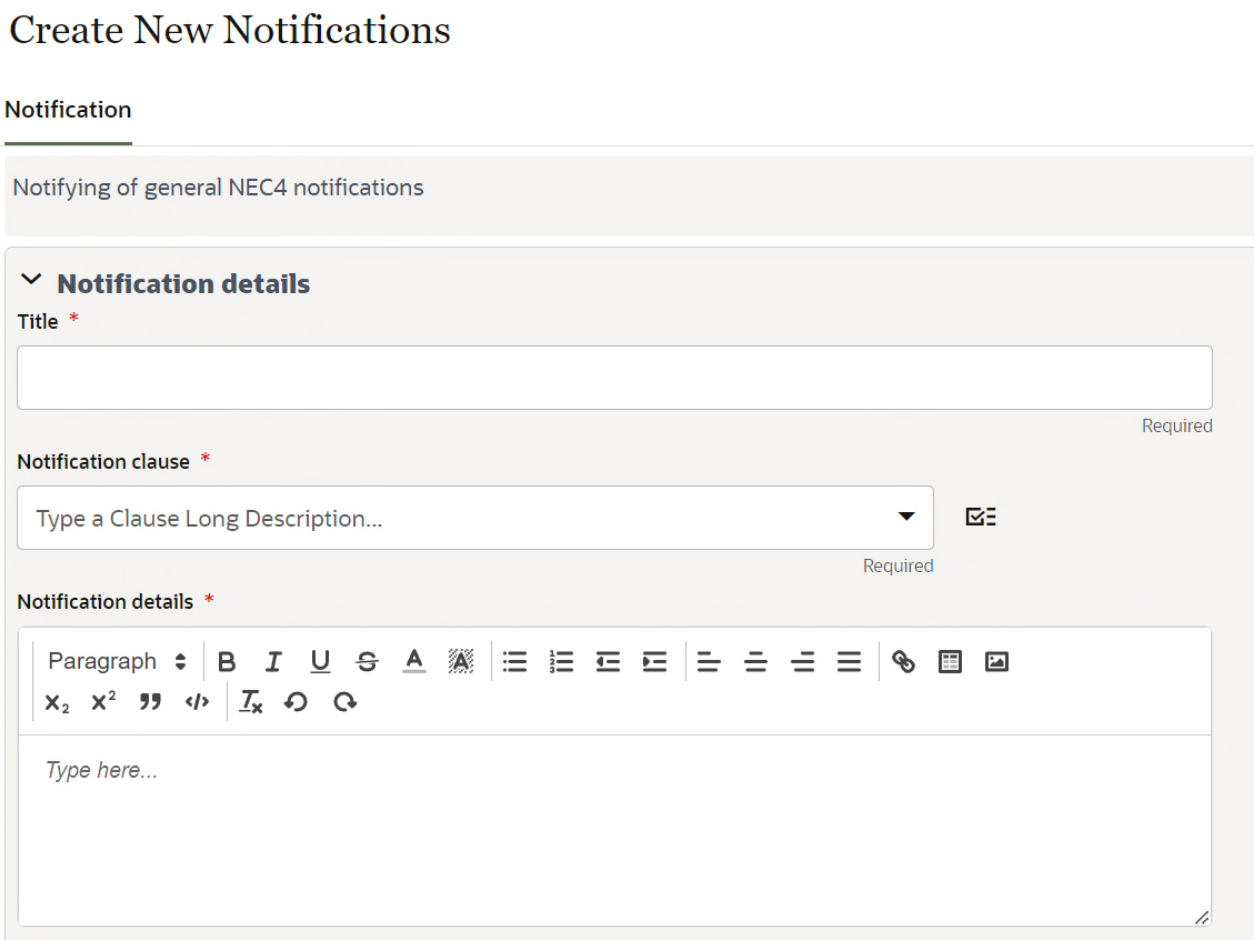


Submitting a Notification

To submit a notification:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notifications**.
3) Select **+ Create** to open the **Create New Notifications** form.
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) Once all fields have been filled in, select **Send** to issue the notification.

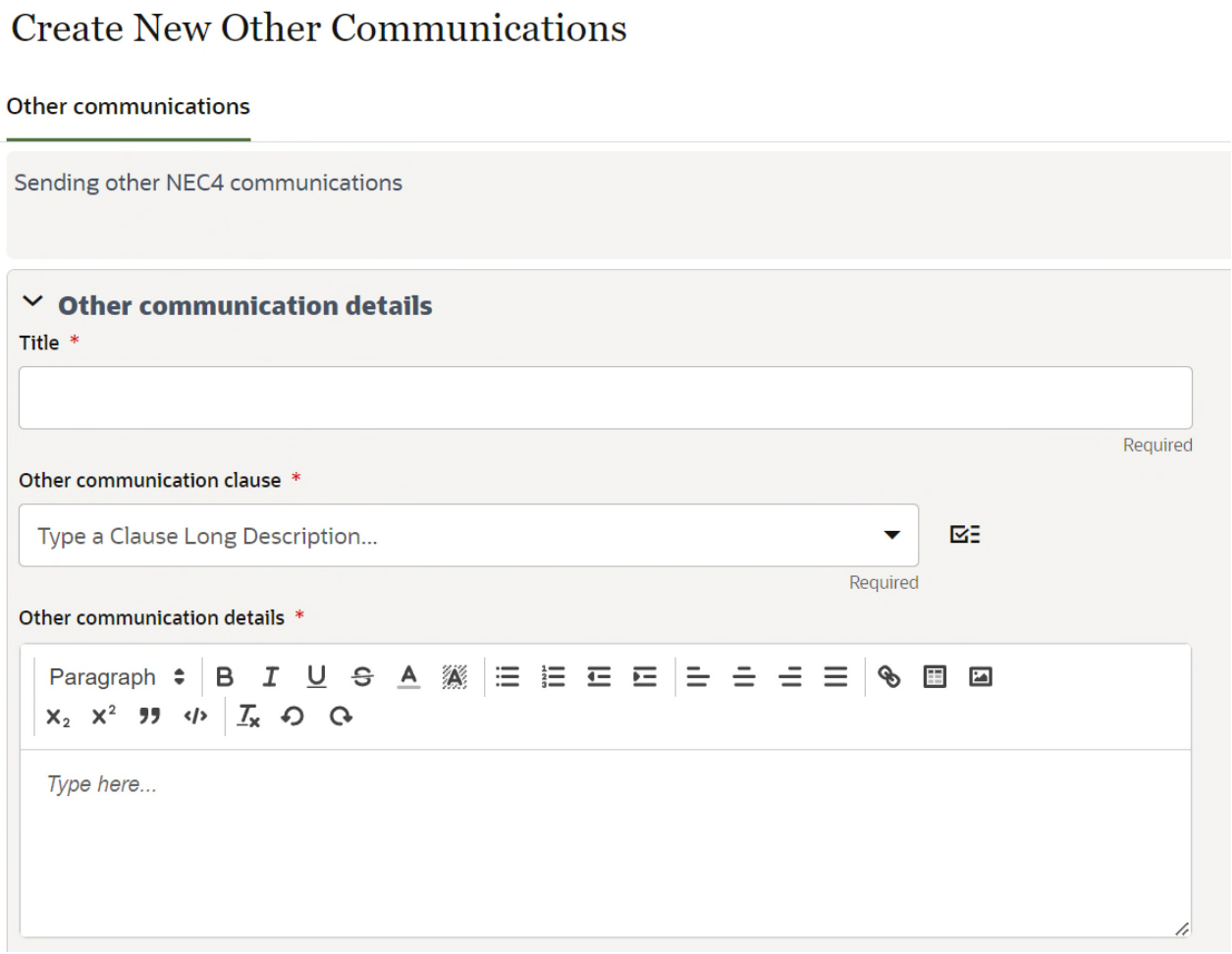
   You can access the notifications from the left **Navigator** by selecting **Notifications**, and then selecting **Notifications**.



Submitting Other Communications

To submit other NEC4 communications:

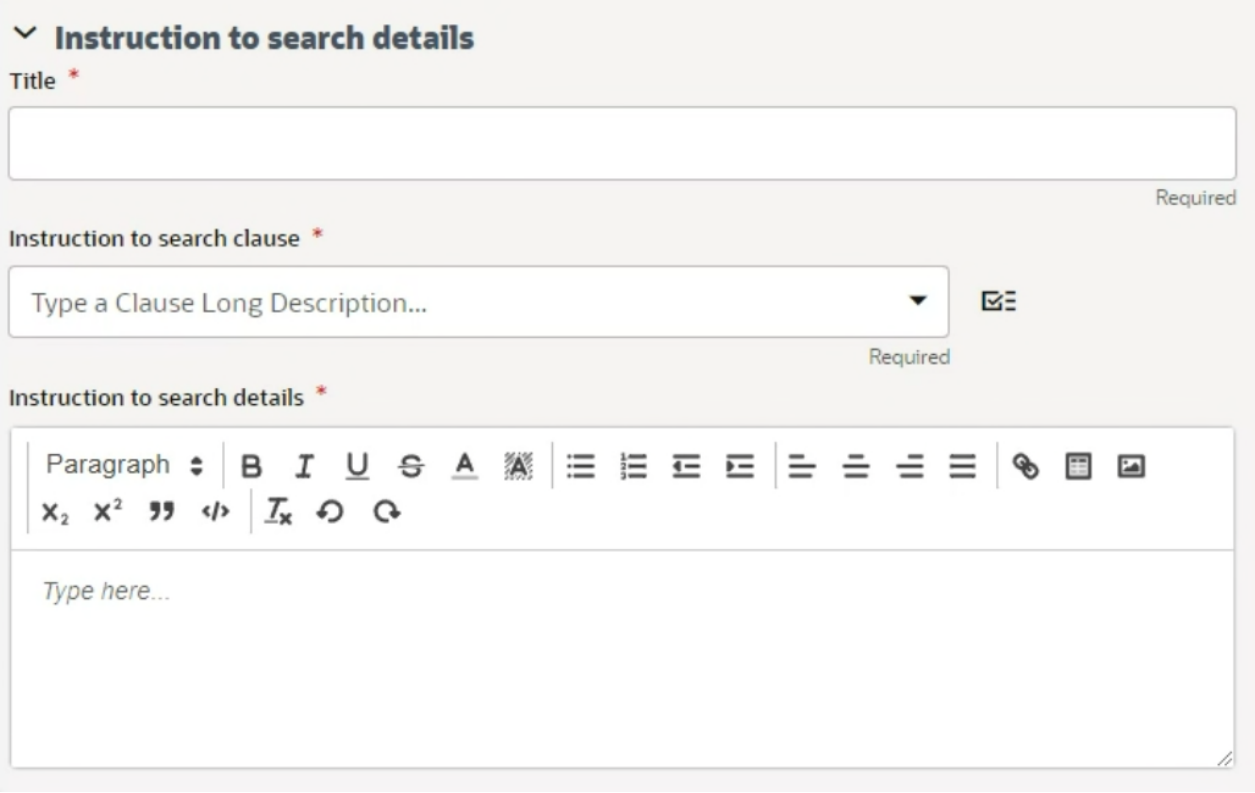
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Notifications**, and then select **Other Communications**.
3) Click **+ Create** to open the **Create New Other Communications** form.
4) Complete all the required fields, the form cannot be sent until all the required fields 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**.

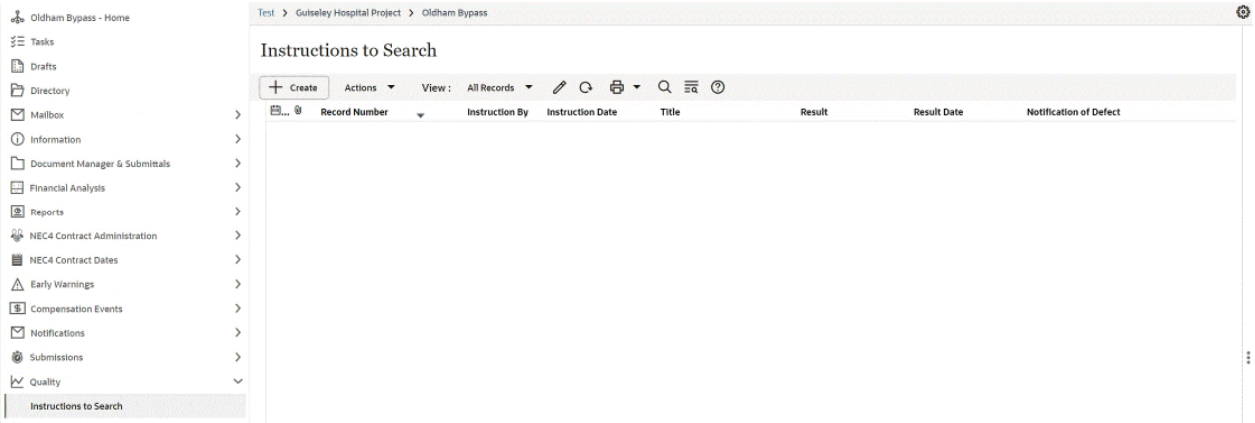


Creating an Instruction to Search

To create a form to instruct an NEC4 search for defect:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Instruction to Search**.
3) Select **Create**. The **Create New Instruction to Search** 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 to search clause** to view all clauses available for selection on this notification.
6) Once all fields have been filled in, select **Send** to notify the instruction to search.
   - The instruction to search is now available in the **Instruction to Search Register.**
   - A task is created for the supervisor to update the results.

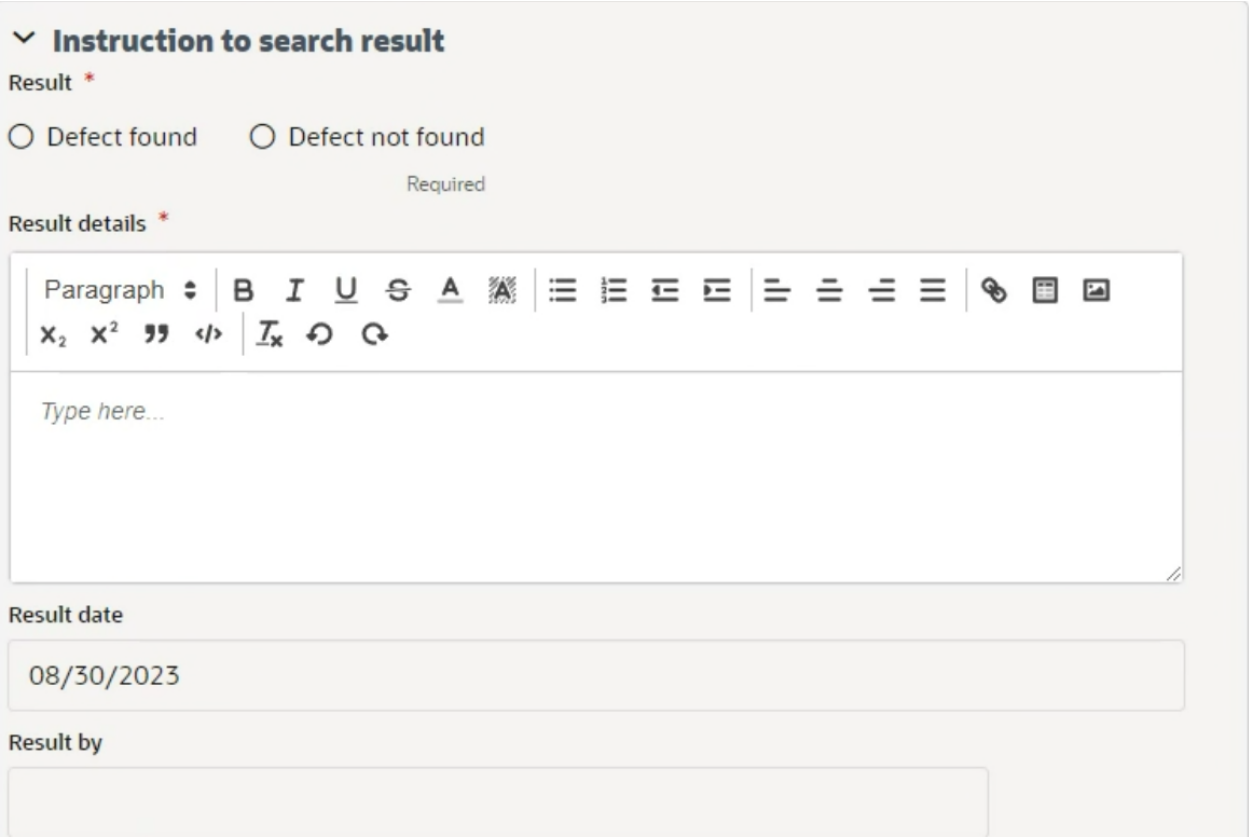



Oldham Bypass - Home
Tasks
Drafts
Directory
Mailbox
Information
Document Manager & Submittals
Financial Analysis
Reports
NEC4 Contract Administration
NEC4 Contract Dates
Early Warnings
Compensation Events
Notifications
Submissions
Quality
Instructions to Search
Test > Guiseley Hospital Project > Oldham Bypass
Instructions to Search
Create
Actions
View :
All Records
Record Number
Instruction By
Instruction Date
Title
Result
Result Date
Notification of Defect

Replying to an Instruction to Search Task

To reply to an instruction to search:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) From your **Tasks** page, select the instruction to search task.
   The **Instruction to Search** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Results** field, select from one of the following options: **Defect Found** or **Defect not Found**.
6) Complete all the required fields.
7) Once all fields have been filled in, select **Send** to notify the instruction to search.
   - You can access the instruction to search from the left **Navigator** by selecting **Quality**, and then selecting **Instruction to Search**.
   - If you selected **Defect Found** in step 5, then a **Notification of Defect** is auto created.

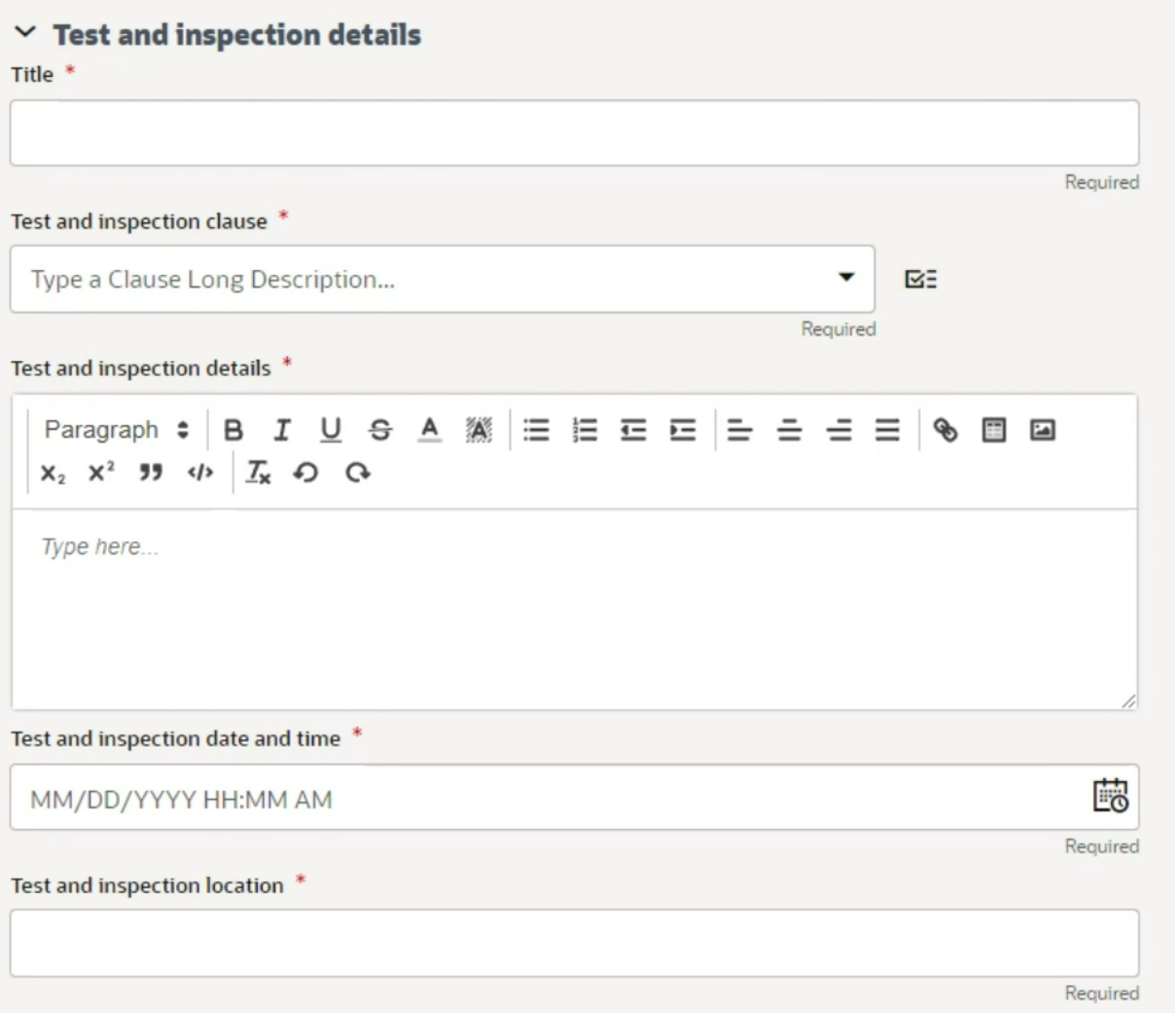


Creating a Tests and Inspections Notification

To create a tests and inspections notification:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Tests and Inspections**.
3) Select **Create**. **T**he **Test and Inspections** 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 **Test and inspection Clause** to view all clauses available for selection.
6) Once all fields have been filled in, select **Send** to submit the test or inspection.

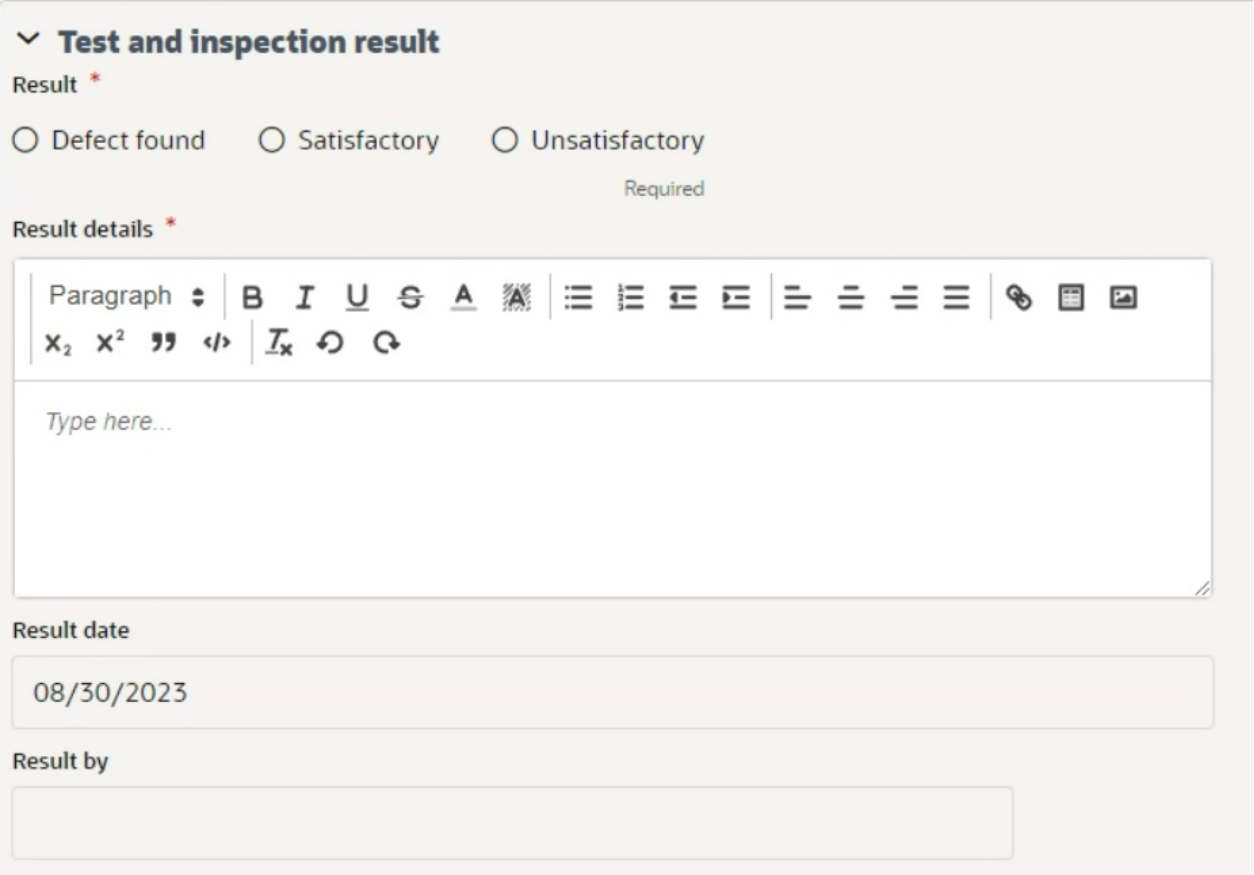
- You can access the test and inspection from the left **Navigator** by selecting **Quality**, and then selecting **Tests and Inspections**.



Replying to a Test and Inspection Task

To reply to a test and inspection task:

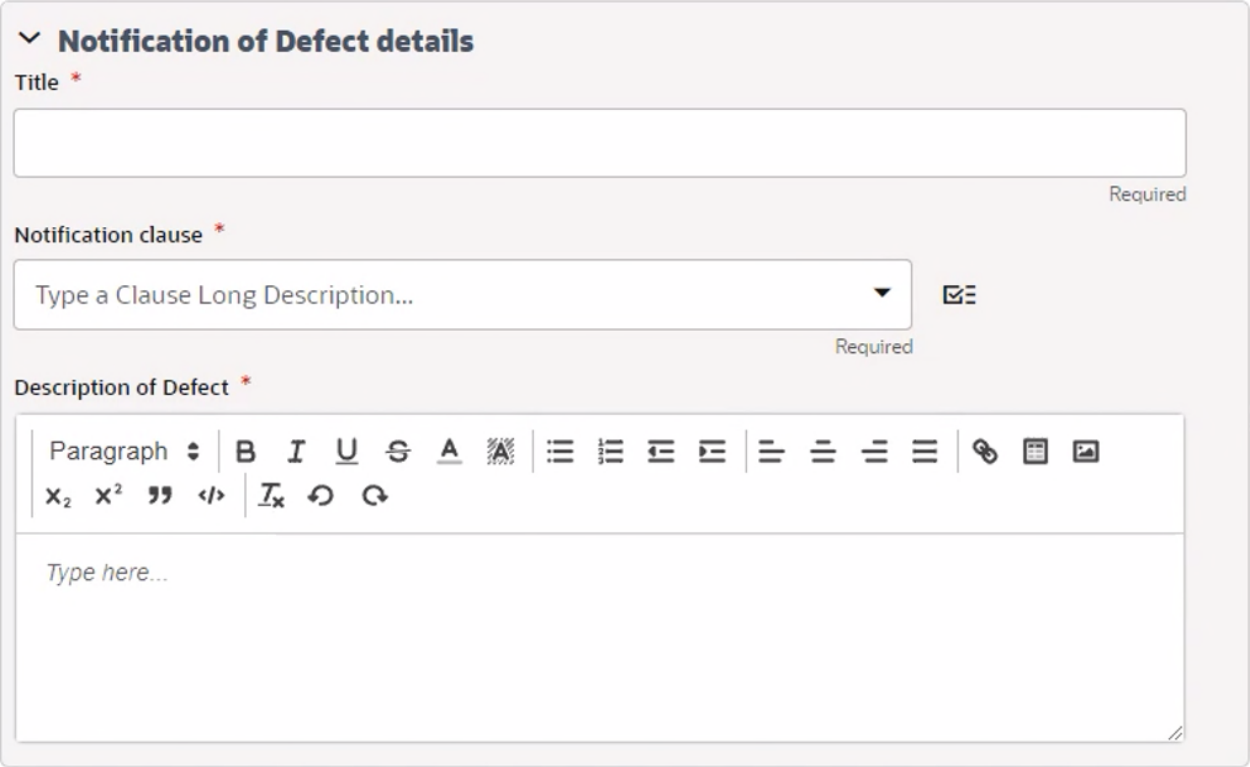
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select a test and inspection task from your **Tasks** page.
   The **Test and Inspection** form is displayed.
4) Select **Accept** to accept the task.
5) For the **Results** field, select from one of the following options: **Defect Found**, **Satisfactory** or **Unsatisfactory**.
6) If the **Defect Found** option is selected, then a **Notification of Defect** is auto created.
7) Complete all the required fields and select **Send** to submit the reply.
8) Once all fields have been filled in, select **Send** to submit the test or inspection.
   - You can access the test and inspection from the left **Navigator** by selecting **Quality**, and then selecting **Tests and Inspections**.
   - If you selected **Defect Found** in step 6, then a **Notification of Defect** is auto created.



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**.

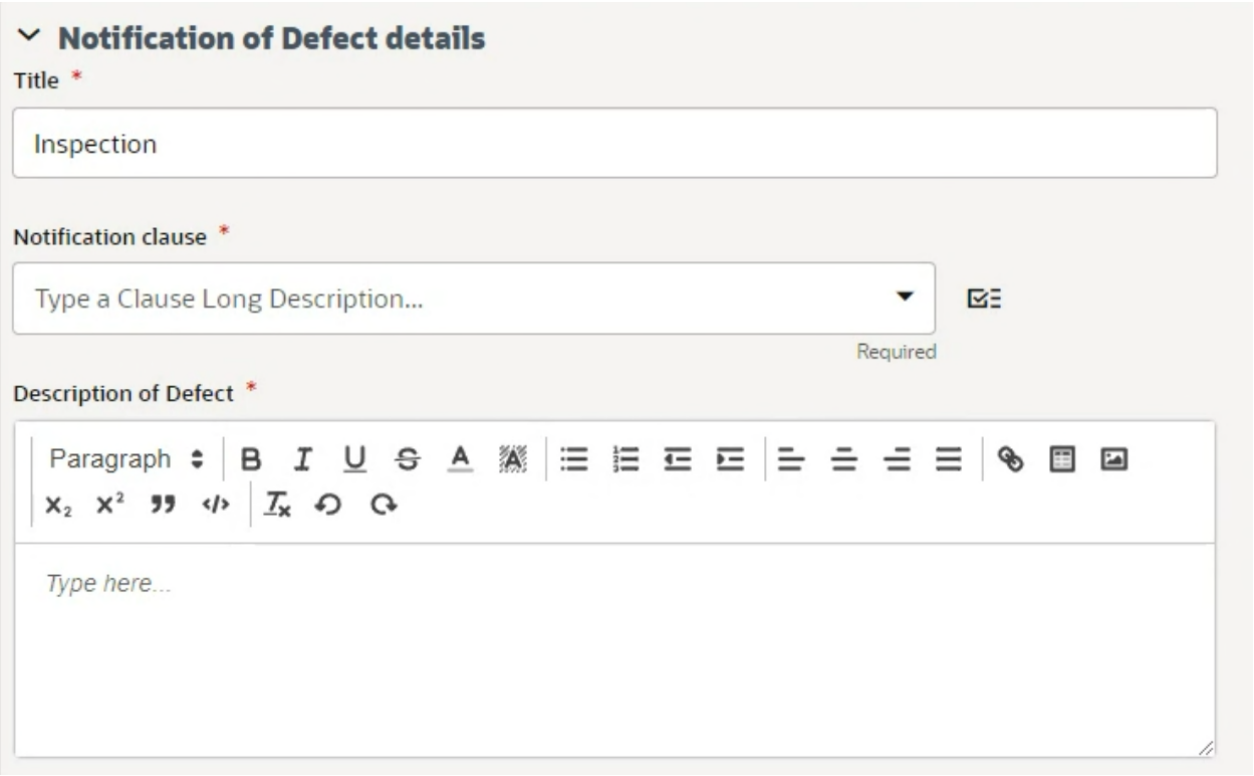


Working with Auto Created Notification of Defects

These notification of defects are auto created either from Instructions to Search or Test and Inspections.

To work with an auto created notification of defect:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Tasks**.
3) Select a notification of defect from your **Tasks** page.
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 open up a pop up to view all clauses available for selection on this notification.
6) Once all fields have been filled in, select **Send**.
   - You can access the defect is now available from the left **Navigator** by selecting **Quality**, and then selecting **Defect Register**.



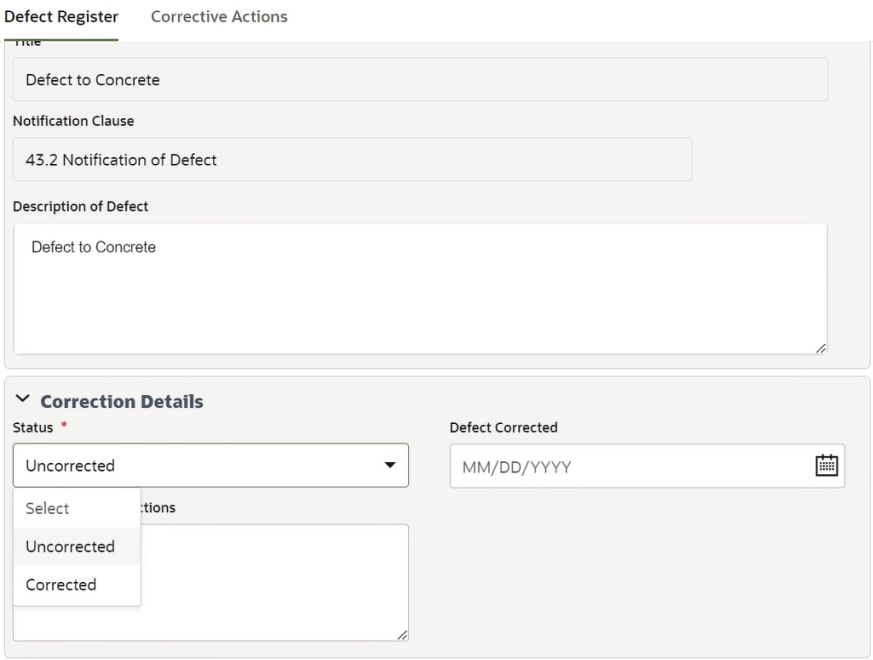
Managing the Defect Register

Use the NEC4 Defect Register used to manage the corrective actions against the defect.

To manage the defect register:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Defect Register**.
3) Select the defect you want to update. The **Defect Register** form is displayed.
4) Select **Edit**.
5) From the **Defect Register** tab under the **Correction Details** section, select a status option: **Uncorrected** or **Corrected**.
6) If the defect is not yet corrected, select the **Corrective Actions** tab to add defect corrective actions.
7) Select **Add**.
8) Complete the required fields.
9) Click **Save** to save the record.
10) Add additional corrective actions by repeating steps 7 to 9.
11) Once all fields have been filled in, select **Submit**.

    You can access the defect from the left **Navigator** by selecting **Quality**, and then selecting **Defect Register**.



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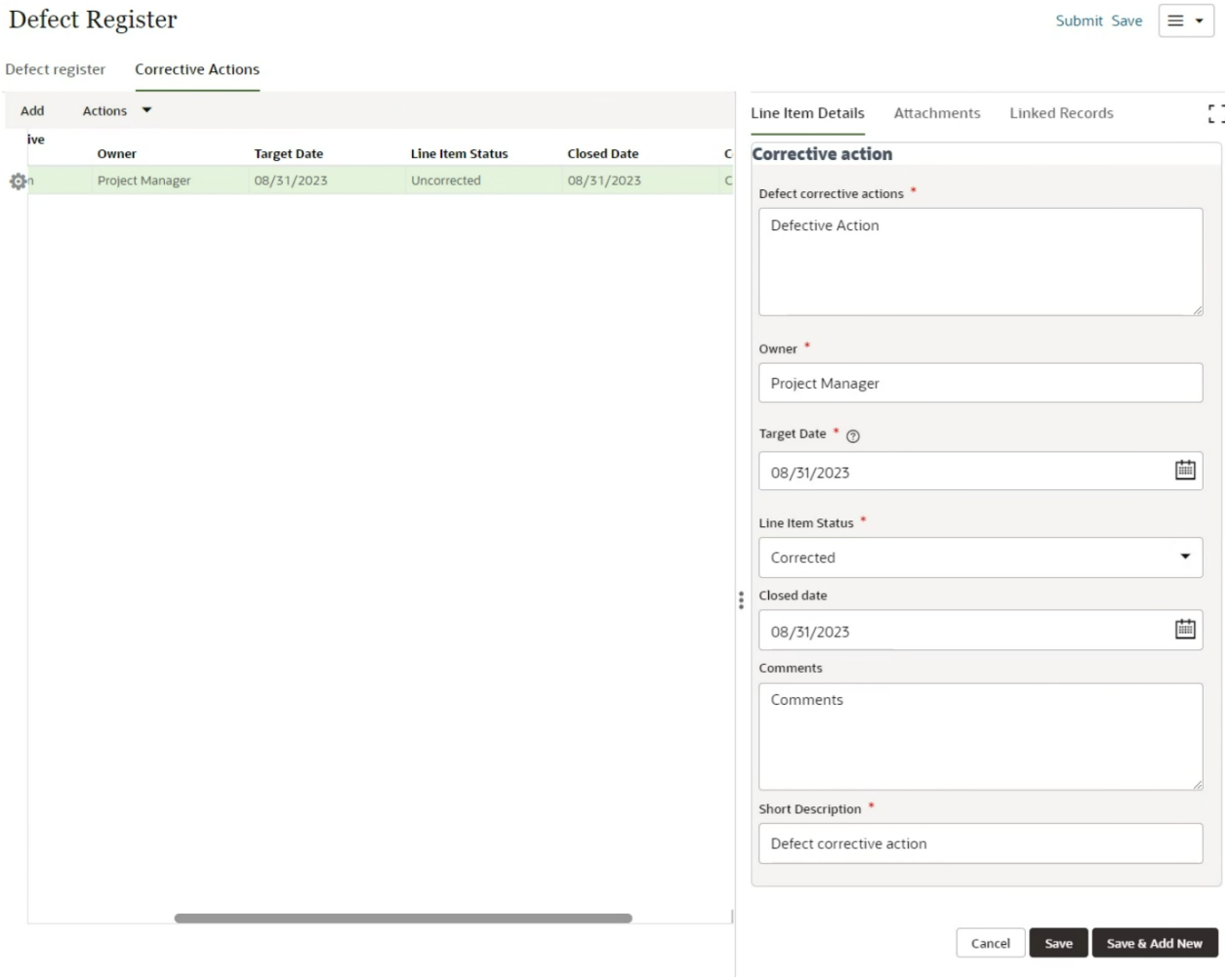
Closing a Corrective Action

To close a corrective action:

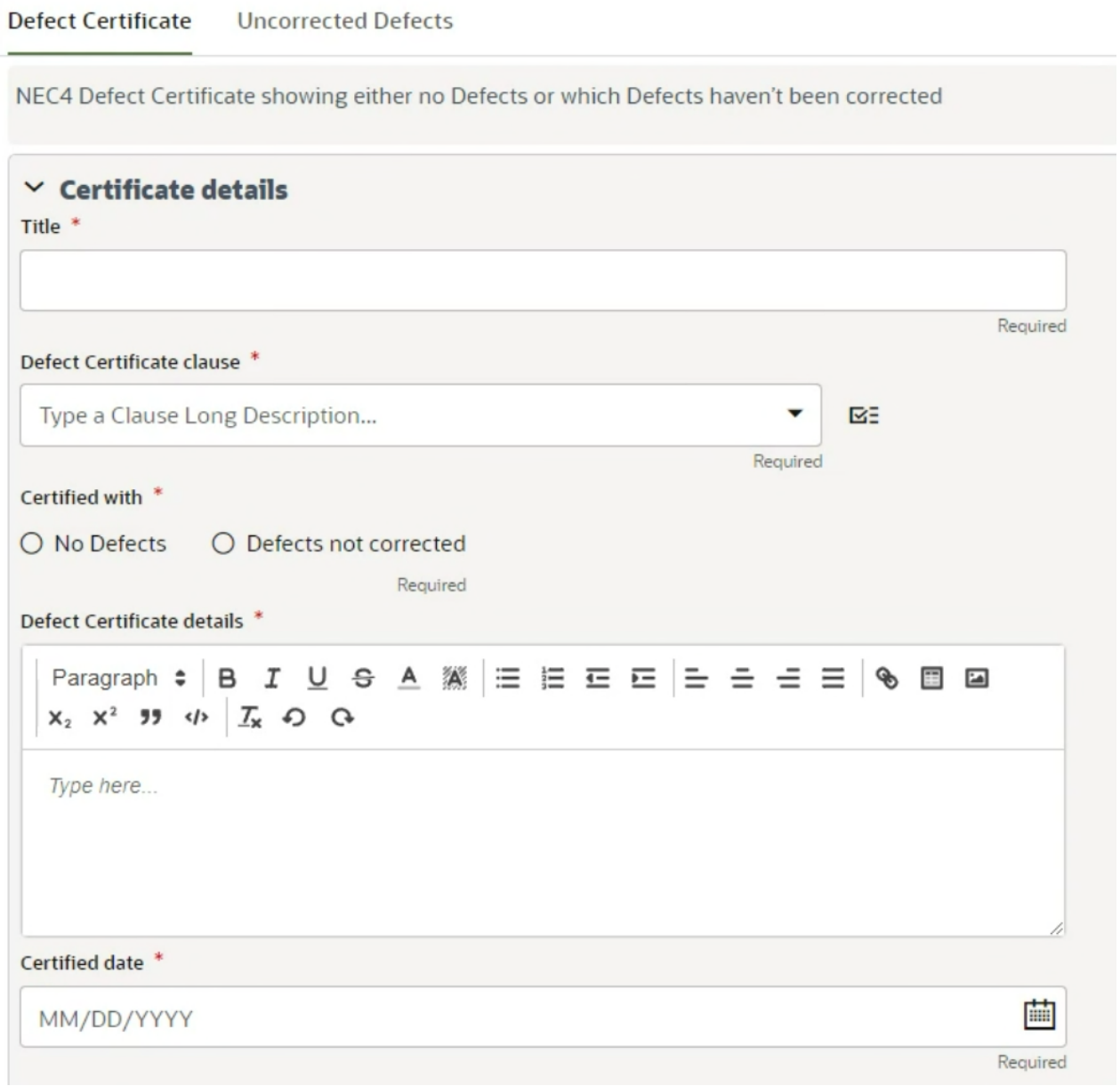
1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Defect Register**.
3) Select the uncorrected defect you want to close.
4) Select **Edit**. The **Defect Register** form is displayed.
5) Select the **Corrective Actions** tab.
6) Change the status of the **Line Item Status** field to **Corrected**.
7) Enter a closed date.
8) Select **Save**.
9) Select the **Defect Register** tab.
10) From the **Defect Register** tab under the **Correction Details** section, change the **Status** field to **Corrected**.
11) Enter the date the defect was corrected.
12) Complete all the required fields in the notification, the form cannot be sent until all the required fields are filled in.
13) Once all fields have been filled in, select **Submit**.
    - You can now access the defect from the left **Navigator** by selecting **Quality**, and then selecting **Defect Register**.

- The status is updated to **Corrected**.



Creating Defect Certificates

To create defect certificates:

1) Navigate to your **Contract Shell**.
2) From the left **Navigator**, select **Quality**, and then select **Defect Certificates**.
3) Select **Create**. The **Defect Certificate** form is displayed.
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 **Defect Certificate Clause** to view all clauses available for selection.
6) If you have uncorrected defects, select the **Uncorrected Defects** tab.
7) Select **Add**.
8) Select the **clause picker** icon next to **Defect** to view all clauses available for selection on this notification.
9) Select **Save.**
10) Complete the required fields.
11) Once all fields have been filled in, select **Send**.

- You can access the defect from the left Navigator by selecting **Quality**, and then selecting **Defect Certificates**.