

Primavera Unifier

User Guide for NEC4 Contractor



G31400-02
April 2026



Primavera Unifier User Guide for NEC4 Contractor,

G31400-02

Copyright © 1998, 2026, Oracle and/or its affiliates.

Primary Author: Oracle Corporation

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

1	About This Guide	
2	Accessing Your Contract Shell	
3	Common Unifier Tasks	
	Viewing Your Tasks	1
	Updating the NEC4 Contract Dashboard	1
	Adding Attachments to a Notification	2
	Creating a Reference Process to Link Notifications	2
	Creating a Response Time Extension Notification	3
	Adding Key/Sectional Completion Dates	4
4	Creating an Early Warning Notification	
5	Submitting Instructions	
6	Creating a Notification of Compensation Event	
7	Creating a Notification of Compensation Event (Short Contract)	
8	Submitting a Quotation	
9	Viewing Implemented Compensation Events	

10	Submitting a Notification
11	Submitting Other Communications
12	Submitting Value Engineering Proposals
13	Submitting a Proposal
14	Viewing Implemented Proposals
15	Replying to an Extension of Time
16	Submitting a Programme
17	Submitting a Plan
18	Submitting a Submission
19	Creating a Test or Inspection
20	Reviewing Test and Inspection Results

21 [Creating a Notification of Defect](#)

22 [Creating a Task Order Quotation](#)

23 [Creating a Task Order Programme](#)

24 [Viewing Task Orders](#)

25 [Updating Defined Cost](#)

26 [Updating the Forecast of Defined Cost](#)

27 [Submitting a Payment Application](#)

28 [Creating a Report](#)

1

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

2

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.

3

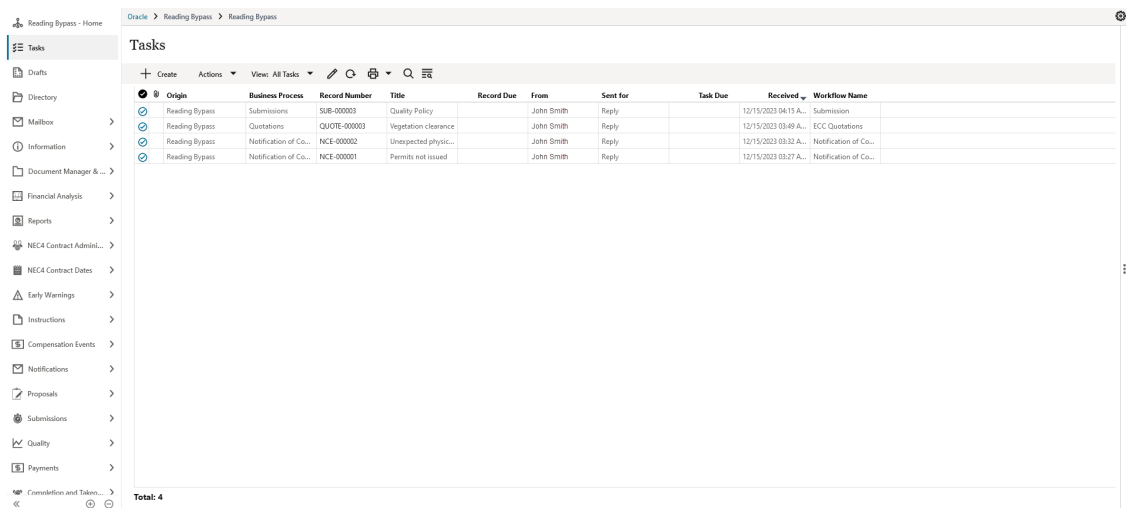
Common Unifier Tasks

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

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**.

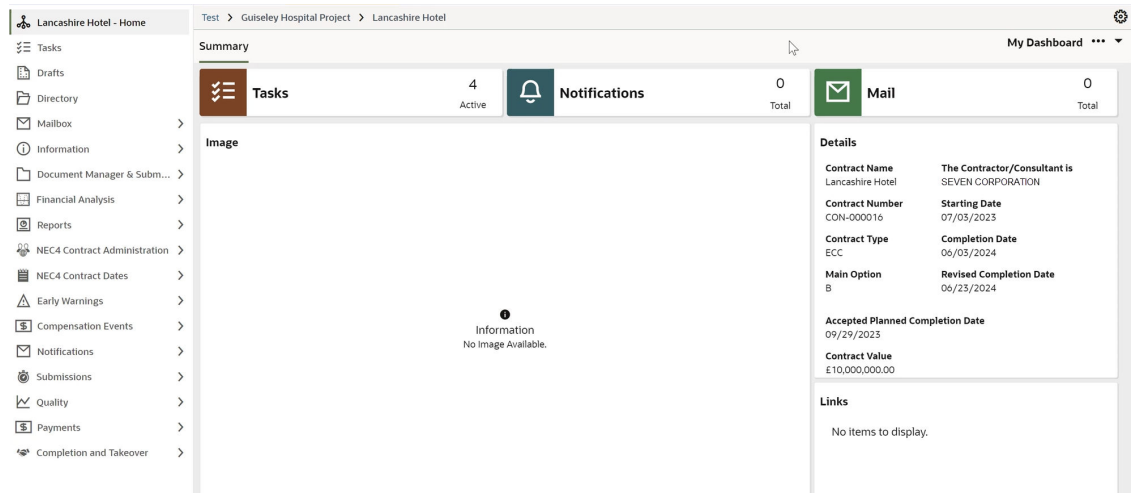


Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
Reading Bypass	Submissions	SUB-000003	Quality Policy		John Smith	Reply		12/15/2023 04:15 A...	Submission
Reading Bypass	Quotations	QUOTE-000003	Vegetation clearance		John Smith	Reply		12/15/2023 03:49 A...	ECC Quotations
Reading Bypass	Notification of Co...	NCE-000002	Unsuspected physic...		John Smith	Reply		12/15/2023 03:32 A...	Notification of Co...
Reading Bypass	Notification of Co...	NCE-000001	Permits not issued		John Smith	Reply		12/15/2023 03:27 A...	Notification of Co...

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.



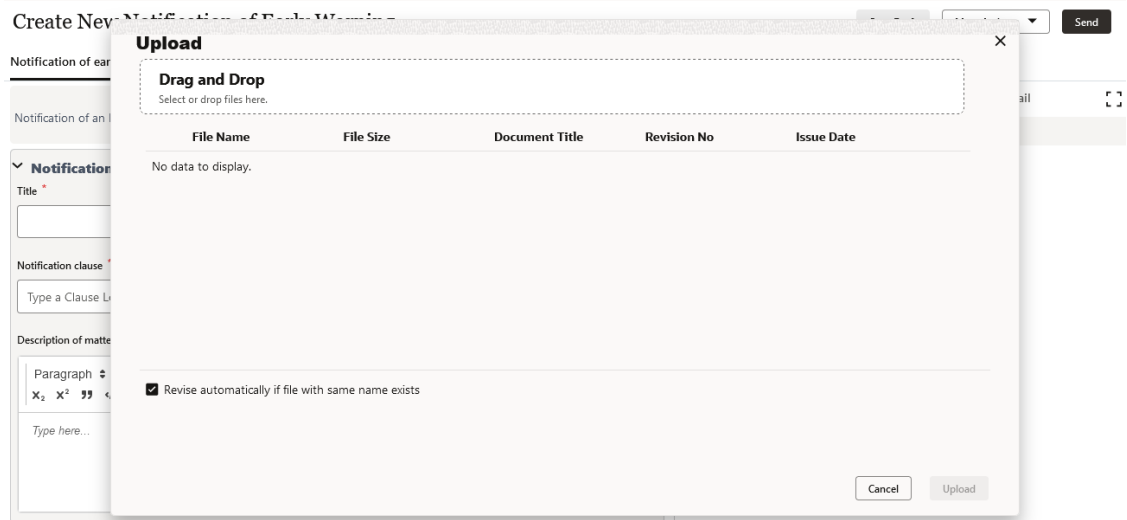
Adding Attachments to a Notification

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.

Create New Extension of Time

Extension of Time

NEC4 Request for an extension of Time

▼ Extension of Time Details

Title * Required

Reason for Extension of Time request * Required

Paragraph ▾ | **B** *I* U ~~S~~ **A** ~~A~~ | ☰ ☷ ☶ ☵ | ☰ ☷ ☶ ☵ | 🔗 📅 🖼️

×₂ ×² ” ” ‹/› | ↵ ↺ ↻

Type here...

Requested Extension Date * Required

MM/DD/YYYY 📅

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

Planned Completion



Short Description * 

4

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**.

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 * Required

Type a Clause Long Description... ☰

Description of Matter * Required

Paragraph ▾ | **B** *I* U ~~S~~ **A** | ☰ ☰ ☰ ☰ | ☰ ☰ ☰ ☰ |

x₂ x² ” ‹/› | *I*_x ↺ ↻

Type here...

5

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.


Create New Instructions


Instruction **Additional Information**

NEC4 instruction including notification of a compensation event and quotation request

Instruction details

Title * Required

Instruction clause *  Required

Instruction * 

6

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.

7

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.

8

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.

Note

















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.

▼ **Quotation Details**

Title *
Materials Delivery Delay

Quotation Clause *
Type a Clause Long Description... Required

Quotation Details *
Paragraph ▾ | B I U  A  |     |     |   
x₂ x² ” ‹› |   
Type here... I

9

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)**.

Record Number	Implementation Date	Quotation	Compensation Event Assessment	Notification of Compensation Event (Short Contract)	Change to the completion date	Change to the prices
CE-000002	06/22/2023		CEA-000002		5	10,000.00
CE-000001	06/19/2023	QUOTE-000001			0	50,000.00

11

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**.

Create New Other Communications

Other communications

Sending other NEC4 communications

▼ **Other communication details**

Title * Required

Other communication clause * Required

Other communication details *

12

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.

Create New Value Engineering Proposals

Proposal Additional Information



NEC4 value engineering proposals used to propose changes to Works/services.

▼ **Proposal details**

Title *

Required

Proposal clause *



Required

Proposal details *

Paragraph | **B** *I* U ~~S~~ **A** | | |

x₂ x² ” ‹› | I_x ↺ ↻

Type here...

13

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.

14

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.

The screenshot shows the Oracle software interface for 'Edinburgh Bypass Construction - Ho...'. The breadcrumb trail is 'Oracle > Bypass & Flood Alleviation Scheme > Edinburgh Bypass Construction'. The left sidebar (Navigator) lists various modules, with 'Proposals' selected and expanded to show 'Value Engineering Proposals' and 'Proposals'. The main content area is titled 'Implemented Proposals' and displays a table of records. The table has columns for 'Record Number', 'Implementation Date', 'Proposal', 'Change to the completion date', and 'Change to the prices'. A single record is shown with the following data:

Record Number	Implementation Date	Proposal	Change to the completion date	Change to the prices
IP-000001	29/08/2023	PRO-000003	7	2,000.00

16

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.

6.  **Note**

See [Adding Key/Sectional Completion Dates](#) for how to create a Key Section Date.

7. 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.

17

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**.

The screenshot shows a form titled "Plan Details" with a dropdown arrow on the left. It contains three main sections:

- Title ***: A text input field with a "Required" label to its right.
- Plan Clause ***: A dropdown menu with the placeholder text "Type a Clause Long Description...". To the right of the dropdown is a "clause picker" icon (a document with a checkmark). A "Required" label is positioned below the dropdown.
- Plan Details ***: A rich text editor with a toolbar containing icons for Paragraph, Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Text Color (A), Background Color (■), Bulleted List, Numbered List, Decrease Indent, Increase Indent, Decrease Spacing, Increase Spacing, Link, Table, and Image. Below the toolbar is a text area with the placeholder "Type here...". A "Required" label is positioned to the right of the toolbar.

18

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.

Create New Submissions

Submission Additional Information

NEC4 Submissions for Acceptance.

▼ **Submission Details**

Title * Required

Submission Clause * Required

Type a Clause Long Description... ☑

Submission Details * Required

Paragraph ▾ | B I U | | |

x₂ x² " " < /> |

Type here...

19

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**.

▼ Test and inspection details

Title *

Required

Test and inspection clause *

Required

Test and inspection details *

Paragraph ▾ | **B** **I** **U** **A** | |

x₂ **x²** **”** **</>** | **I_x**

Type here...

Test and inspection date and time *

Required

Test and inspection location *

Required

22

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.

Note

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.

▼ **Task Order quotation details**

Title *











Barrier maintenance required




Task Order quotation clause *

Type a Clause Long Description...  

Required

Task Order quotation details *

Paragraph | B I U S A  |     |     

x₂ x² ” ‹/› |   

Type here...

23

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**.

Programme Details

Title * Required

Task Order Programme Clause * Required

Task Order Programme Details * Required

Task Order * Required

Planned Completion Date * Required

24

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**.

The screenshot displays the 'Task Orders' page within a web application. The breadcrumb trail at the top reads 'Test > Guiseley Hospital Project > Glasgow Bypass Maintenance'. The page title is 'Task Orders'. On the left, a 'Navigator' sidebar lists various menu items, with 'Task Orders' highlighted. The main content area features a table with the following columns: Record Number, Title, Task Order Date, Task starting date, Task Completion Date, Revised Task Completion Date, and Task Accepted Planned Completion. A single record is listed with the following data:

Record Number	Title	Task Order Date	Task starting date	Task Completion Date	Revised Task Completion Date	Task Accepted Planned Completion
TO-000001	Barrier maintenance re...	30/08/2023	01/09/2023	04/09/2023	04/09/2023	11/09/2023

25

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.

Defined Cost Details

Title * Required

Defined Cost Details *

Paragraph **B** *I* U ~~S~~ **A**

x₂ x² " " </>

Type here...

Defined Cost Summary

Reference Commit *

Type a Record Number... Required

Total Defined Cost

26

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**.

▼ **Notification Details**

Title *

Required

Forecast Details *

Paragraph ▾ | **B** *I* U ~~S~~ **A** | |

|

Type here...

Forecast of Total Defined Cost *

Previous Forecast of Total Defined Cost *

Difference since last forecast

27

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.

Create New Payment Applications

General Payment Breakdown

Application for payment and certification on an NEC4 Contract

Payment Application Details

Title *

Required

Reference Commit * ⓘ



Required

Assessment Date *



Required

Payment Application Details *

Paragraph ▾ | **B** *I* U ~~S~~ **A** | | |

x₂ *x²* " " < /> | *x* ↻ ↺

Type here...



28

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.

