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PROJECT DELIVERY SYSTEM (PDS) TRAINING
SECTION 01 - OVERVIEW
RELEASE DATE: 09-APR-2020

REVISION TRACKING

Revision	Author(s)	Approved By	Issue Date	Reason
v3-0	Sage Method		3/12/2020	Unifier Go Live Mar 2020
v3-1	Sage Method		4/3/2020	Final Updates
v3-2	Sage Method	K. Dunklau	4/9/2020	Updates to document manager section.

TABLE OF CONTENTS

Disclaimer

This document and its contents have been prepared and are intended solely for the UCB PDS system, Oracle Unifier, for the purposes of learning how to use the system. CU Boulder and Sage Method assume no responsibility to any other party in respect of or arising out of or in connection with this document and/or its contents.

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1.0 UNIFIER OVERVIEW

1.0.1 INTRODUCTION

The UCB PDS project was undertaken in January 2018 after a process of software and vendor selection. Oracle Unifier will replace the Capital Projects module of FAMIS. As of December 2019, all new Request Applications will be completed in Unifier. Project will be managed there until Financial Closeout. FAMIS Capital Projects module will be retired when all projects are closed out in FAMIS.

The system will support previous efforts of process definition and lifecycle management for campus construction projects. The system will:

1. Enable efficient project management planning and execution from start to finish to allow for enhanced customer service.

2. Decrease in entering duplicate information.

3. Enable easier reporting.

4. Create one source of planning and project data.

5. Enable system of record for planning and project information during the life of the project.

6. Replace a portion of the existing system. (Capital Projects module of FAMIS)

7. Reduce time to decision.

8. Increase transparency and visibility into timely information to facilitate key metric measuring and reporting.

9. Facilitate continuous improvement in processes.

10. Support proactive management.

1.1 GENERAL TASKS AND ADMINISTRATION

1.1.0 INTRODUCTION

General tasks and administration help with navigating Unifier and using features that are repeated throughout the system. This section will enable you to understand Unifier basics so that when you start learning the specific processes, the system functionality is familiar.

1.1.1 LOGGING IN / OUT OF UNIFIER (UPDATED: 4/2/2020)

Goals	How to log in and out of Unifier and what you will see
Navigation	Unifier Log In Screen
Action By	All Users
Pre-requisites	UCB username and password
Related Files	None

Action By: All Users	Example

1. **Navigate** to the provided URL using Chrome (other browsers cause functional issues).

2. If you are a UCB employee, your single sign on will redirect you to the single sign on screen.

   Note: If a pop-up blocker appears, configure your browser to always allow pop-up windows from this site.

3. Should you forget your password or otherwise experience difficulties logging in, please contact the UCB Office of Technology Help Desk https://oit.colorado.edu/tutorial/identikey-manager-forgot-my-identikey-password or call 303-735-4357 (5-HELP).

CU Login Name

Identikey Password

☐ Check this box to view your Digital ID Card and reset release approvals before logging into the service. Learn More...

Continue

Trouble signing in? We can help.

To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account.

Note: Due to the nature of this authentication page loading dynamically per service, DO NOT bookmark the URL in your browser's address bar. Instead, bookmark the service URL (e.g. *https://voicethread.colorado.edu* or *https://qualtrics.colorado.edu*).

University of Colorado Boulder
Office of Information Technology
IT Service Center | 303-735-HELP(4357)

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Action By: All Users	Example

4. A successful login will display Unifier in a new window.

5. **Select** the "U" icon to enter Unifier.

6. Once logged in, Unifier will default to your Home screen (if you logged out on this screen).

7. If initial login and setup is completed, skip to: 1.1.4 Navigating the Project

   Note: Once tabs and preferences are set, these will appear each time you login (as long as you use the sign out button.)

Action By: All Users	Example

8. Select "Tasks" in the left-hand menu to access all tasks across all projects.

9. Select "Drafts" in the left-hand menu to access all drafts across all projects.

   Note: Any form with a workflow that is saved and closed without sending will only be available to the user who saved it in their drafts.

   Note: Tasks and Drafts are also accessible within project shells under *Project* –Task Manager>Tasks / Drafts. (Where "project" is the actual name of your project.)

   Note: Selecting an item from the "Tasks or Drafts" log will take you to the record.

10. Selecting a task or mail item will open it in a new window.
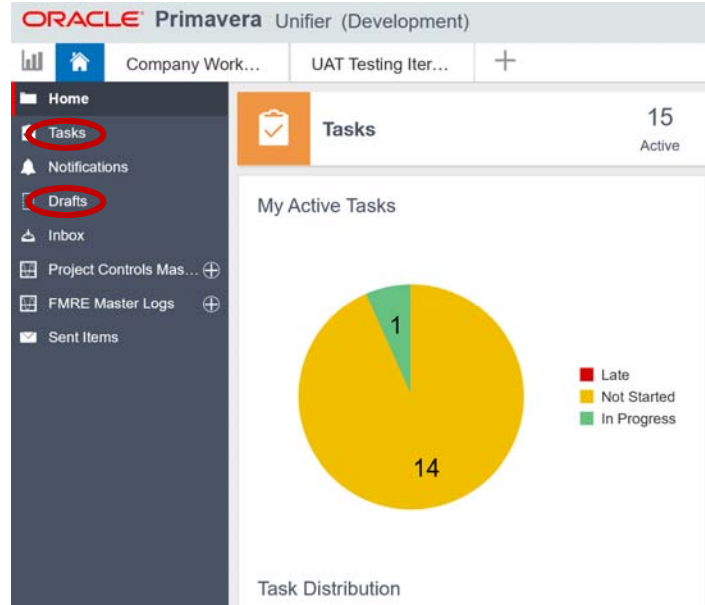
11. To create a project tab, **select** the "+" icon along the top, like opening a new browser window.

12. To find a specific project, **search** for your project name.

    Note: You will only be able to see items you have permissions to. If you can't see something, please contact your Project Coordinator to validate your permission settings.
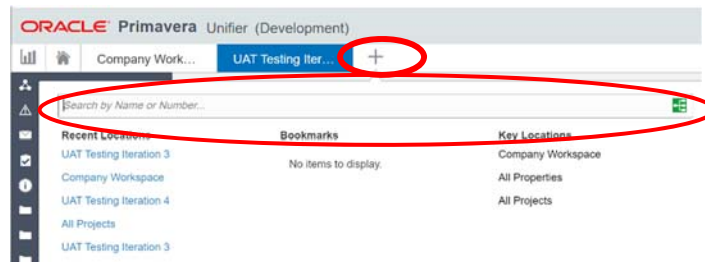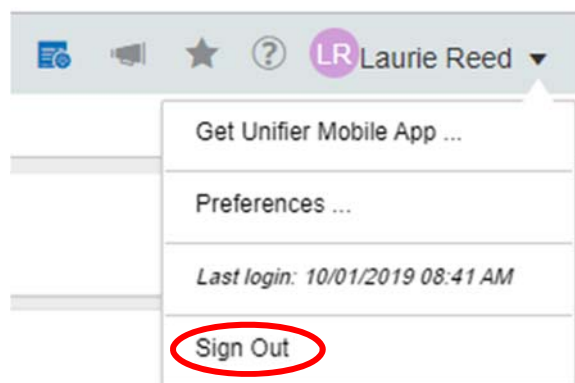
13. **Navigate** to the Home Tab.

14. When logging out of Unifier, **select** your name and then the "Sign Out" link instead of using the browsers "X" button. You must then close the browser window, not just the browser tab. This officially ends your session on the server.

    Note: it is recommended practice to be on the Home tab screen before logging out.

END TASK

## 1.1.2 SETTING PREFERENCES (UPDATED: 10/24/2019)

|	
Goals	How to set preferences, proxy, etc. per user.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

Action By: All Users	**Example**

1. In Unifier, select your name and then "Preferences" to open the User Preferences screen.

   Note: When you log in for the first time, it is important to check and set your preferences.
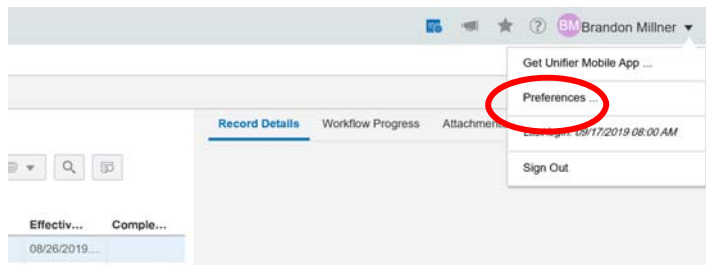
2. In the General tab, confirm your details.

3. **Double-**click on the graphic to open the window to update your profile picture.

4. **Follow** instructions and select "Save".

5. Select "Apply" to accept any changes; then select "OK."
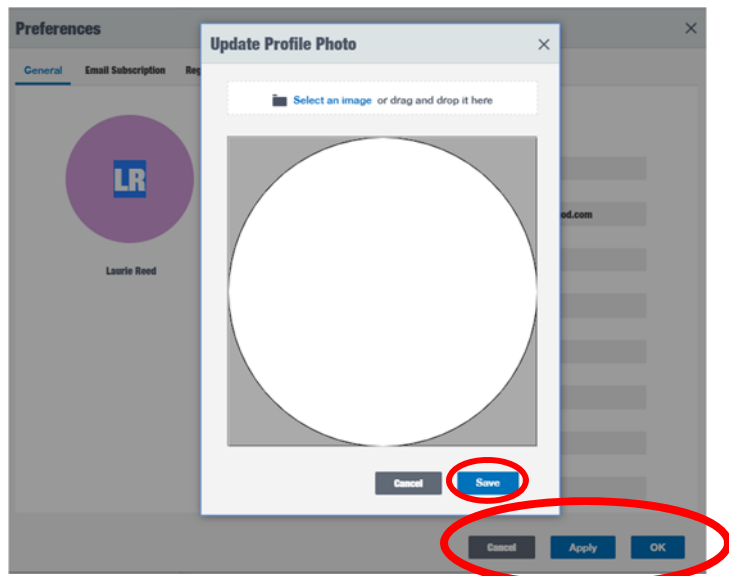
Action By: All Users	Example

6. Select the "Region Format" Tab

7. In the lower left confirm your time zone, language, and date format.

8. In the lower right confirm your number and currency formats.

   a. **Ensure** "Show Currency Symbol" is checked.

   b. Negative Currency Format to be (#123). Do not use other options.

   c. Negative Number Format to be (123). Do not use other options.

   Note: The greyed-out box to the far right is an example of the number and currency formats shown in step 8.
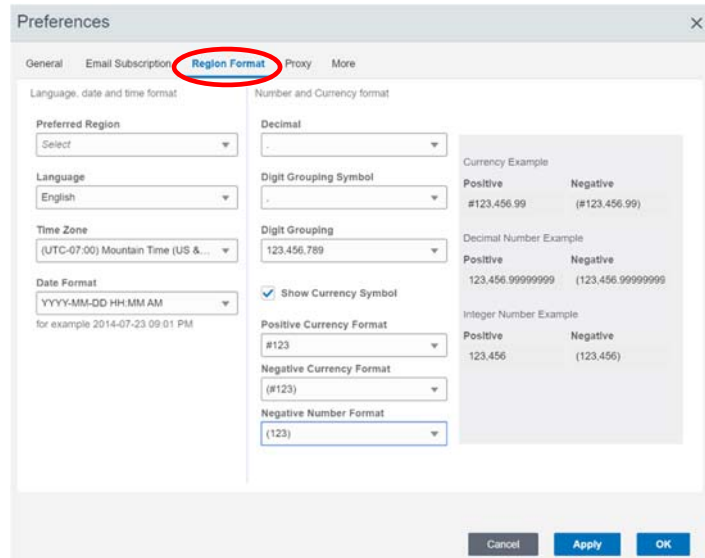
9. **Select** to "Email Subscription" tab.

10. **Set** your email subscriptions.

    Note: Contact your administrator if you have any questions on the settings.

    Note: The goal is to login to Unifier to access project information rather than via individual emails.

    Note: Do not modify anything in the first column.

11. **Select** "Apply" to accept any changes; then **select** "OK."
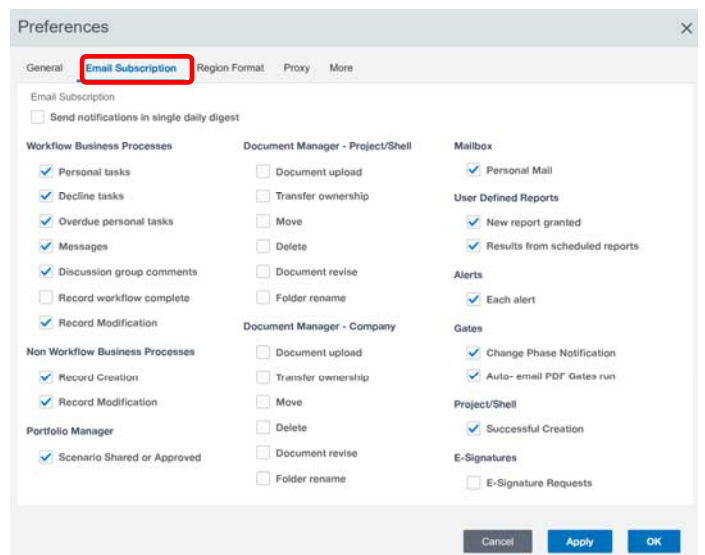
Action By: All Users	Example

12. **Select** the "Proxy" Tab.

   a. In "My Proxy" you can add, modify, or remove a proxy.

   b. In "I am Proxy" is the list of available users for whom you can function as their proxy.

   c. In "Proxy Login History" is the history of proxy logins. For example, the Name, Login Date, and Logout Date of the Proxy.

Note: **Do Not Allow Proxies** option is only available for Site/Company Administrators, Company users and Partner users, otherwise seen as read-only.

Note: A proxy is someone who can perform tasks in Unifier on your behalf. This also includes records that have been created by the you. Any actions completed by the proxy will appear in the Audit logs.

Note: An assigned proxy will have access to <u>all</u> of your projects. You cannot select different proxies for different projects. You can assign two or more proxies to allow a different proxy to work on a particular project.
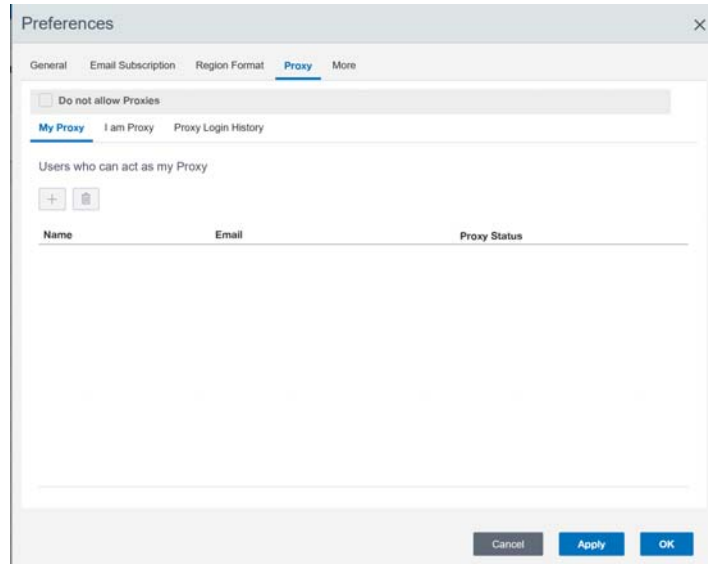
13. **Add** a user who can act as your proxy by:

   a. **Selec**t "**+**" (Add).

   b. Under "Grant Proxy Access To", select a user to act as your proxy.

   c. Enter the Start Date/Time and End Date/Time that you can allow a proxy user access to your account, for example start and end dates of your vacation. Or, you can **select** Active/Inactive.
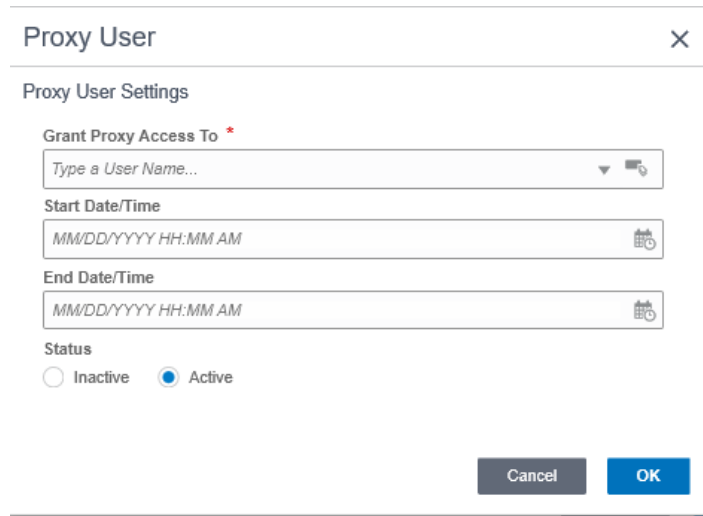
Note: Time defaults to 5 PM.
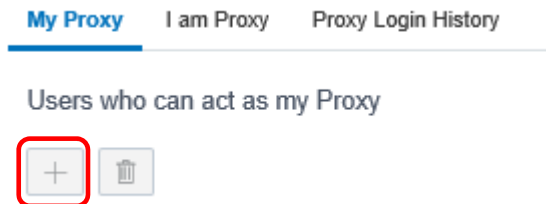
Action By: All Users	Example

14. Proxy Users whose status is set to **Active** will receive email notifications of tasks that need to be completed. Use Inactive to disable a proxy's access.

15. **Select** "OK".

16. **Select** "Apply" and then "OK".

    Note: You must select "Apply" after setting a user as your proxy or the user will not be added as your proxy.

    Note: You can have more than one user added as your proxy.

    Note: If you are unable to add a user as a proxy, your System Administrator can assign users on your behalf.

17. **Select** "OK" to close the user preferences screen.

18. To login as someone else's proxy user:

    a. **Select** "Username" to drop down the contextual menu.

    b. **Open** "Proxy For" to show a list of users who designated you as their proxy.

    c. **Select** a user to act as proxy for.
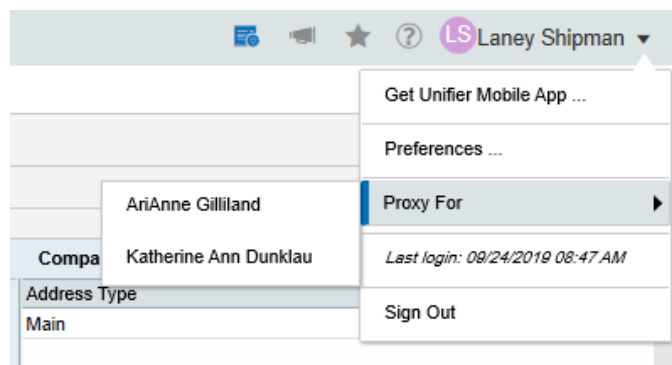
Action By: All Users	Example

19. The user appears in right upper corner as "Proxy for User Name". At this point you can now perform functions and tasks via the selected user.

20. Select the pull down the contextual menu in the username and select "Sign Out".

21. You will be returned to your user page.

22. **Select** the "More" tab.

   a. Use this tab to configure settings such as the view options, view exceptions, and default login view.

23. "Default View" contains Native and Unifier Viewer. This determines how Unifier displays files that are attached to business processes in the Document Manager. This can be documents, drawings, or images.

   Note: Native means the document will open using its program, such as Word or Excel.

24. **Viewer Exception** lets the user specify which extensions to use which viewer. For example, you may have Native as your default viewer but want to use Unifier Viewer for some file types such as adding graphical markups and text comments. You would type the extension in the "Always Use Unifier:" field.

25. **Select** "Apply" and "OK".
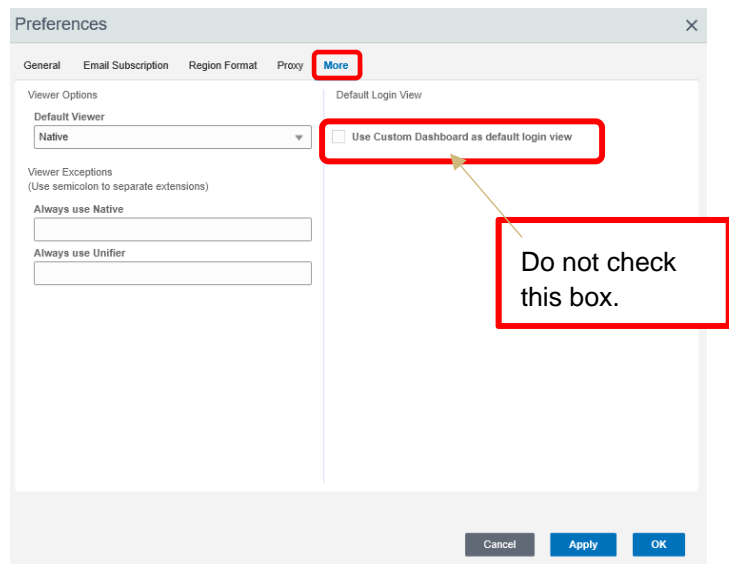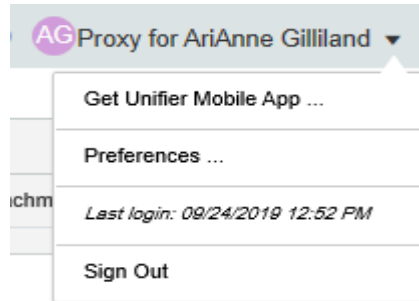
END TASK

1.1.3 SETTING BOOKMARKS (UPDATED: 10/24/2019)

|	
Goals	How to set bookmarks for projects or specific views.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

Action By: All Users	Example

1. Bookmarks are a useful functionality that allows fast and efficient navigation between projects.

   Note: This is a helpful alternative to creating tabs across the top, especially when you have a lot of projects.

2. Navigate to the screen you would like to bookmark, for example: a project home screen.

3. Select the star in the upper right-hand corner of the screen.

4. Select "Add" to add the project to your bookmarks.

   Note: Unifier does not validate bookmark names so be aware of creating duplicates and use clear naming conventions.

   Note: You cannot add bookmarks in admin mode.

   Note: A bookmark is based on a user's permissions. For example, if you do not have access to a module, Unifier will display the Home page. If you do have access it will open the shell or project.

5. To see your bookmarks, **Select** on the "star."

6. You may also rearrange bookmarks.
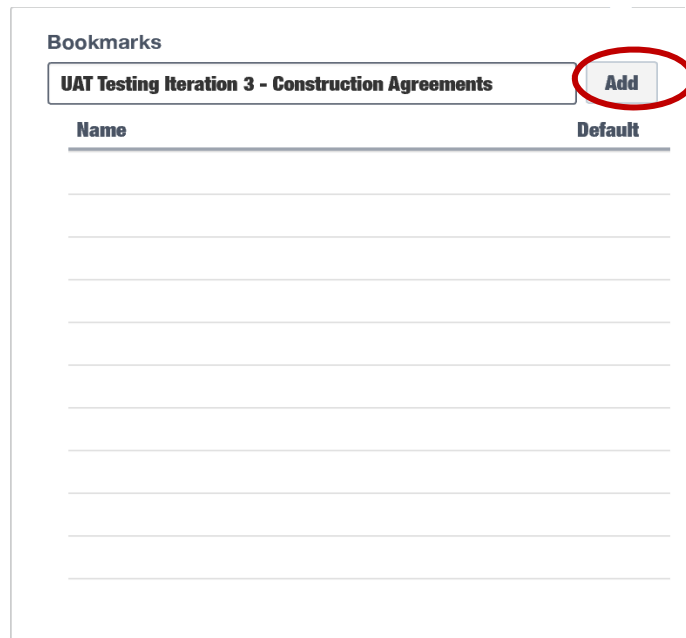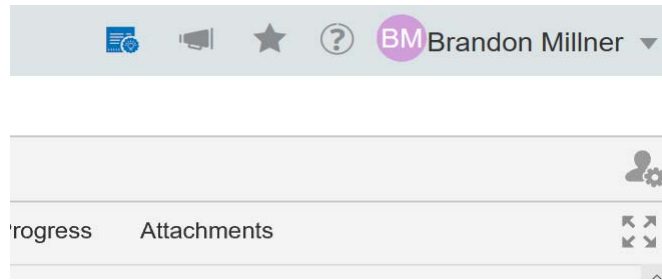
Action By: All Users	**Example**

7. Select a bookmark to modify by Selecting on the gear by the name.

8. Select "Remove", "Move Up", or "Move Down", as necessary.

   Note: The checkbox is only used for setting the default login; for other actions, select the bookmark by Selecting on the name.

9. Select outside of the bookmarks drop down to exit the bookmarks screen.

END TASK

1.1.4 NAVIGATING THE PROJECT (UPDATED: 11/12/2019)

Goals	How to navigate through Unifier at a high level including finding the "help", search and tab functionality.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

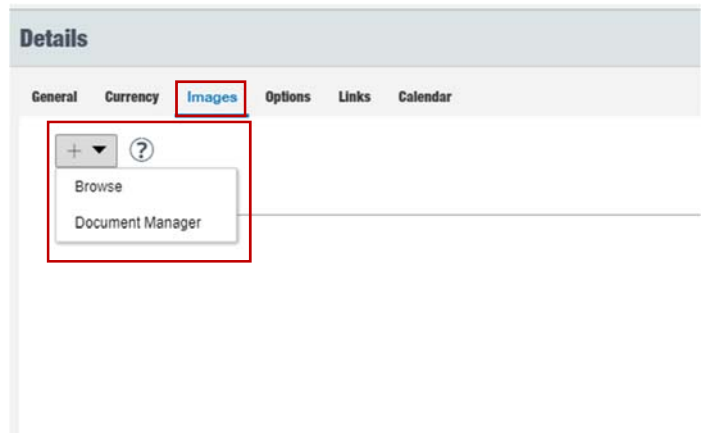| Action By: All Users	Example
1. If this is the first time you have logged in, the screen will default to your home screen. 2. The home screen allows you to **view** your "tasks" list across all projects.	
3. To find your project, **search** your bookmarks, **Select** on a project tab, or find the project using the "**+**" to the left of your home screen; like opening a new browser window.	
4. By default, the screen will open to the last screen you were on prior to selecting "Sign Out". If it is the first time you have visited this project, it will default to the Home screen where the dashboards are visible.	
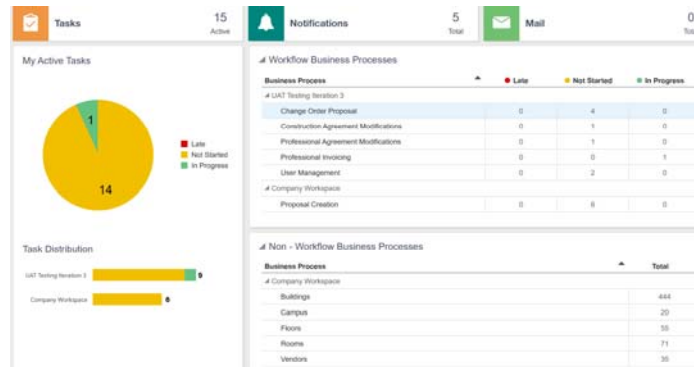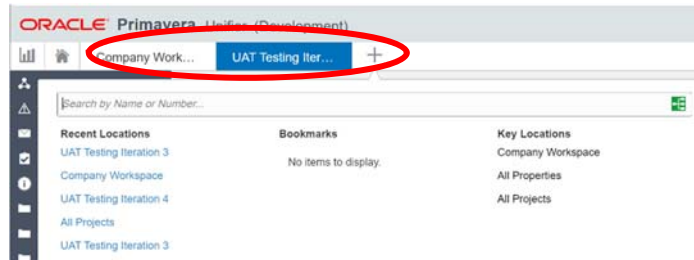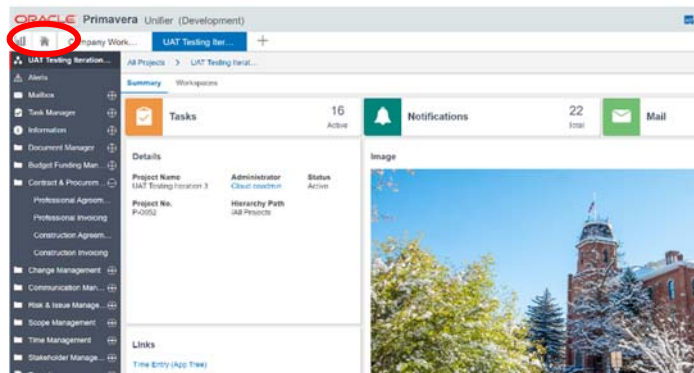
Action By: All Users	Example

5. To add or change an image, **access** the drop-down menu on the project dashboard.
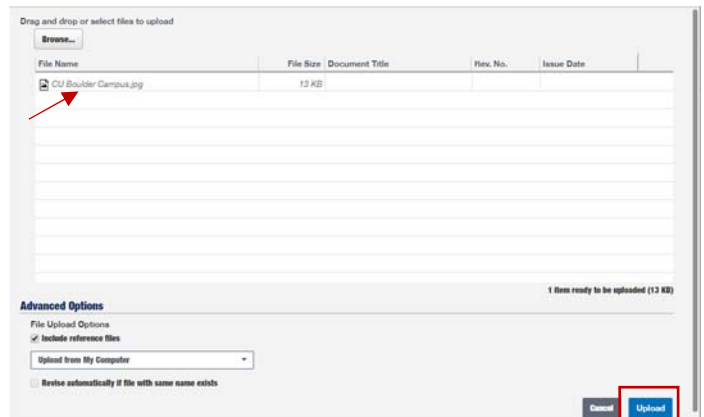
   Note: Adding or changing an image, can only be performed by the Project Coordinator, Project Manager or Project Planner.

6. **Select** "Details"

7. In the "Images" tab **select** an image by using "Browse" or "Document. Manager" from the drop-down.

8. The selected file name will appear.

9. **Select** Upload to add the image to the project dashboard.

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Action By: All Users	**Example**

10. Business processes are forms or workflows that are created as part of the project. They are listed down the left side of the screen.

    Note: This may look different depending on your permissions.

11. To open business processes, or BP's, **select** the "+" on any of the modules located on the left side of the screen to expand the selection. Conversely, select "-" to collapse.
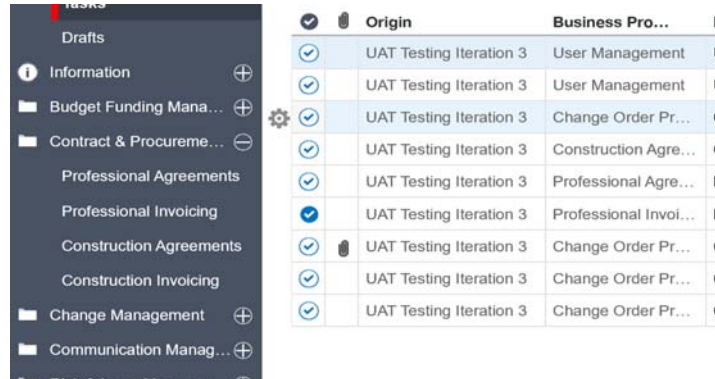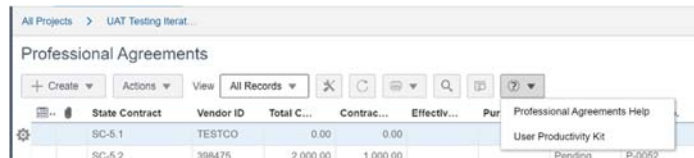
12. To **find** generic Help at any time, use the "?" in the upper right corner of the screen.

13. To find help for specific business processes, **select** the "?" from within the process screen and select the help file for that specific process.

    Note: User Productivity Kit is not available for selection.

END TASK

## 1.1.5 COMPLETING TASKS, VIEWING MESSAGES, AND VIEWING DRAFTS IN UNIFIER (UPDATED: 4/2/2020)

Goals	Shows how to view, accept, and respond to tasks in Unifier
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

Action By: All Users	Example

1. **Navigate** to the Home screen within Unifier.

2. The home screen allows you to **view** your "to do" list across <u>all</u> projects.

   Note: Tasks, Messages, and Drafts are also accessible within project shells under Project – >Tasks Drafts.
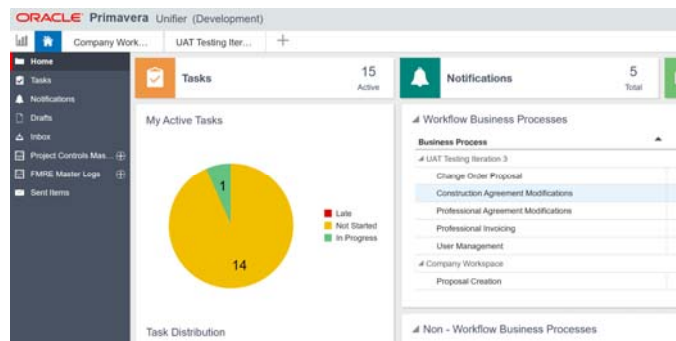
3. Select "Tasks" in the left-hand menu to access all tasks across all projects.

   Note: Tasks, Messages, and Drafts are also accessible within project shells under Project – Home> Tasks / Drafts.

   Note: Selecting a task or mail item will open it in a new window.
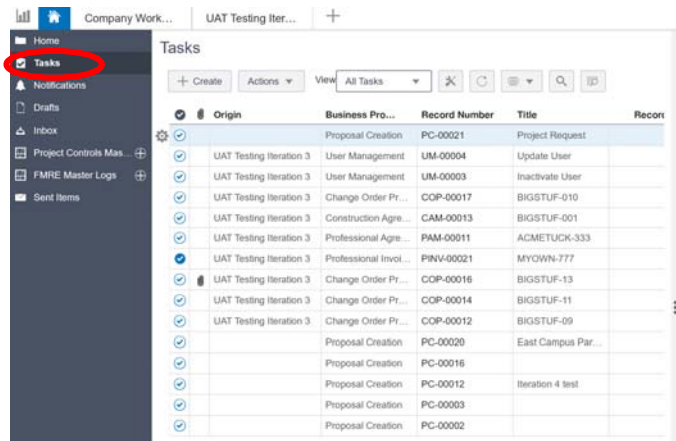
Action By: All Users	Example

4. Select the relevant task from the list, via two options:

   a. **Double-Select** (step 5) to open or

   b. **Highlight** and **Accept** (step 6).

   Note: To assist in locating a task, pay special attention to the column headings "Origin", "Business Process", and "Sent for"; you may also utilize the "Find" and "Filtered By" features.

   Note: All fields are view-only before the task is accepted.

5. Double-click the task.

   a. The form opens in a new window.

   b. **Select** "Accept" in the upper right corner.

6. Select the task by highlighting it:

   a. Select "Accept Task" from the "Action" drop down list which allows you to take action on the task (e.g. approve, revise, or cancel). Do not select "Decline Task" or you will not be able to action the task. The Decline Task functionality is not being utilized at this time.

   b. This step does not open the task in a window.
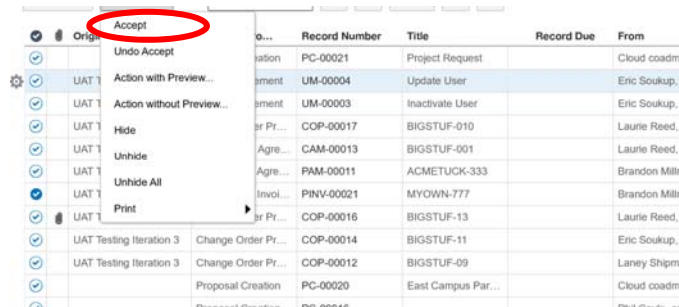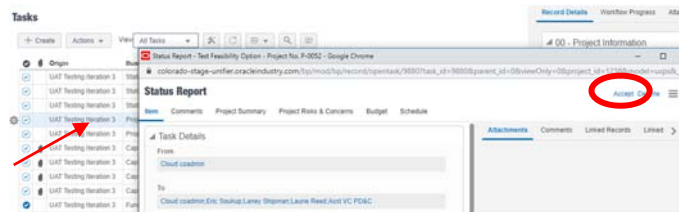
7. Once the task has been accepted, any required or editable fields will become available for entry. Enter data as needed.

   Note: You can undo accept if another recipient should complete the task instead.

8. Required fields will have a red asterisk adjacent to the field.

9. Editable fields will be white and read-only fields will appear gray.

   Note: Dependent on the business process, there may be no fields available for entry.

Action By: All Users	Example

10. In the upper right corner **select "Send",** a new screen will appear called **Workflow Action Details**.
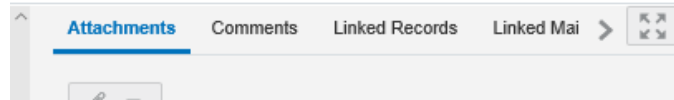
11. Select the appropriate workflow action from the options provided in the pull-down menu.

    Note: The **To** section shows all the users/groups being assigned the next portion of the task.

    a. *If the task allows* for additional recipients or selection of the recipients, the To and CC fields will appear.

12. **Select** "**Send".**

13. If a validation was not met or a required field left blank on the form, then an error will appear when attempting to select "Send".

14. Complete all required fields on the form to send the record along the workflow.

15. Once the task has been completed, the record can still be viewed in its respective business process, in the project, in a read-only format.

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Action By: All Users	Example

16. To access mail for <u>all</u> projects, when in the Home screen, Select "Inbox" icon.

17. Select the relevant message from the list.

18. **Double-Select** the selected email.

19. The form opens.
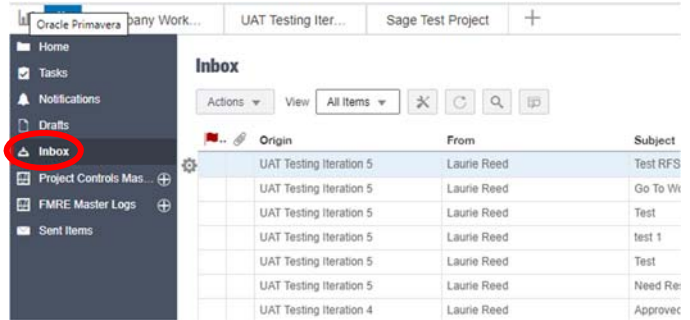
20. Messages can also be flagged for importance or review. In the Flag dropdown you can **select** an action. For example, 'call' or 'for your information'.

   Note: It is good practice to edit the subject line to be something more appropriate
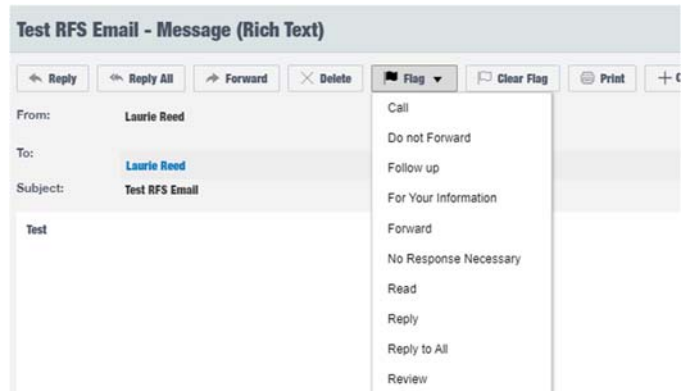
21. When in a project, **Select** "Mailbox" in the left-hand menu to access messages.

22. **Select** the relevant message from the list.

23. **Double-click** the selected email to open the form.

24. **View** the record information and **select** "Close Window" (the x) when completed.
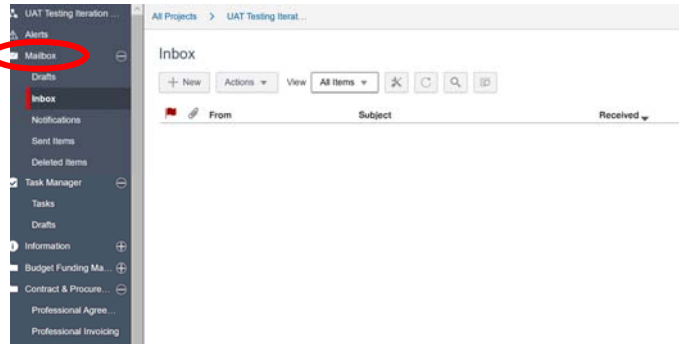
| **Action By: All Users**	**Example**

25. To compose a message, **select** the Inbox Mailbox folder.

26. **Select** New and choose your recipients for the following fields: To (the Select User list will appear), CC, External CC field, and BCC.

27. **Flag** a message for follow-up by Selecting the Flag button.
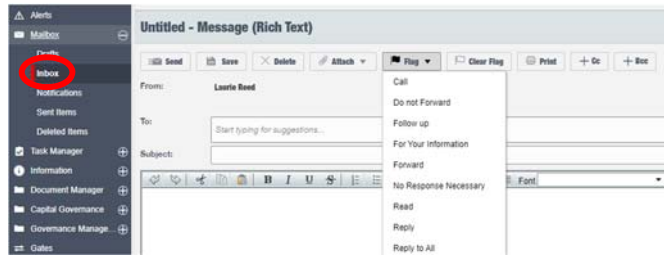
   Note: Messages can be sent to and received from external (non-Unifier users). However, to send messages back, they must be added to the allowable email list. Contact your Project Coordinator for more information.

28. To respond to a message, **double-click** to open and select Reply.

29. If you want to send to all users in the message chain, **select** Reply All.

30. To forward a message, **select** Forward.
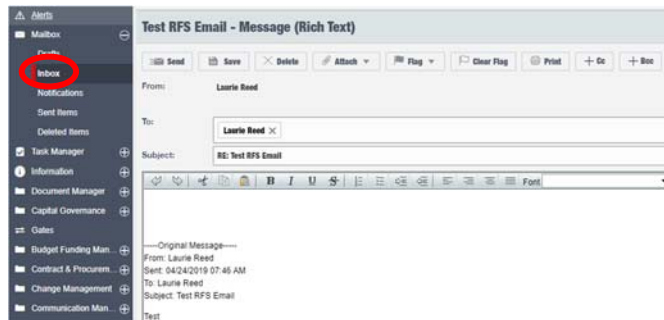
   Note: It is good practice to edit the subject line to be something more appropriate.

31. After one of these three options (steps 26, 27, or 28) is selected you can Flag a message for follow-up by Selecting the Flag button. A new window will appear and, in the Flag to field you can select an action. For example, 'call' or 'for your information'.
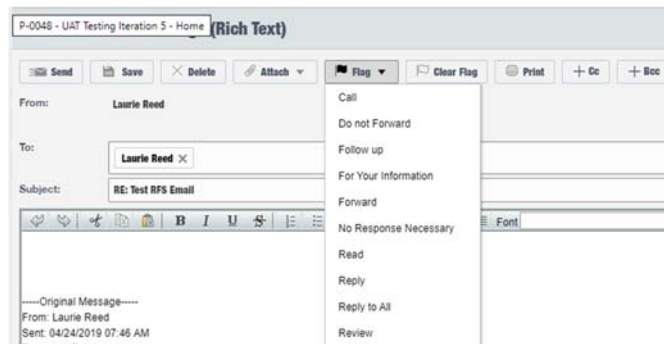
   Note: Mailbox messages can be linked directly to related business process records. Any file attachments will remain on forwarded messages.

32. To send an email directly from that business process, open the record that you would like to send.

33. From the upper menu button, **select** **Email as Attachment** to initiate an email directly.

   Note: It is good practice to edit the subject line to be something more appropriate.

Action By: All Users	**Example**
34. Being copied on a record or email is also possible.	
35. When you are listed on the CC line of a record in workflow your copy will appear as notifications on the project Home screen and under Inbox.	
36. To find a business process record that started and saved but not "published" using Submit, select "Drafts" in the left-hand menu to access all draft records across all projects.	
37. **Select** the relevant draft from the list.	
38. **Select** "Open" from the options at the top; alternatively, double-Select the task.	
39. The form opens.	
40. **Enter** the required record information and **select** a workflow action and **select** "Send: when completed.	

Note: When you save a record before sending it to the next step in workflow, it will be shown in Drafts. Once the draft is completed and sent, or deleted, it will be removed from the list.
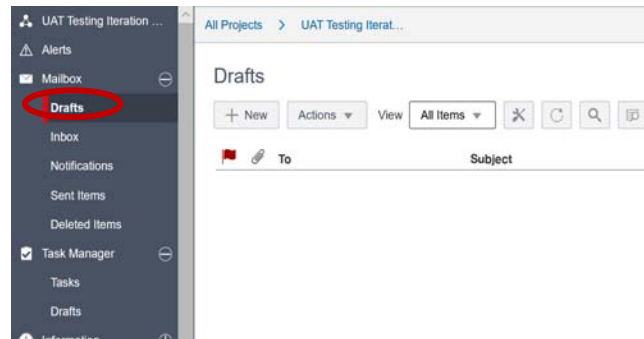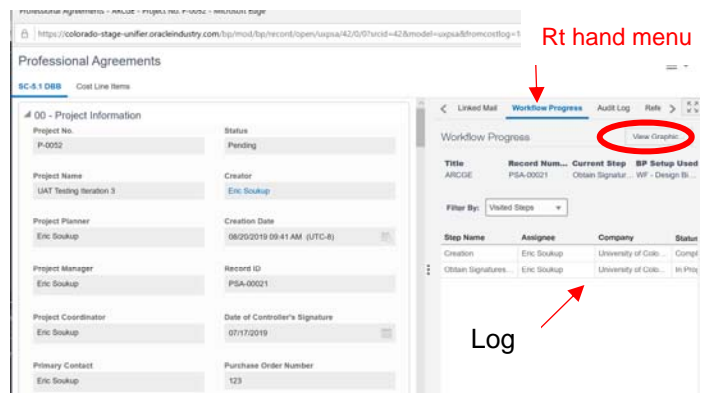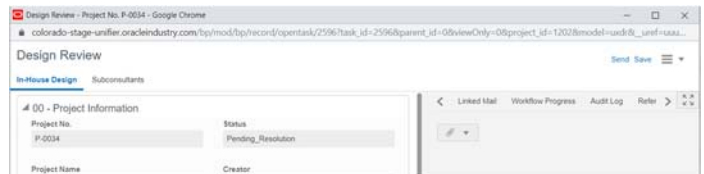
END TASK

1.1.6 DETERMINING WORKFLOW PROGRESS (UPDATED: 4/2/2020)

Goals	How to look at a workflow and the progress.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

Action By: All Users	Example

1. **View** the workflow progress or Audit log at any point to see information about that record and how it was approved or changed over time.

2. **Navigate** to the record in question by selecting from the task list in either Home or in the project task screen.

3. **Open** the record.

4. On the right menu bar of the open record, **scroll to the right** until you see "Workflow Progress" and select.

5. The Log shows all workflow steps, who they were sent to, their status and the date of the action.

   a. If the task was sent to multiple people and one has accepted the task, it will show In Progress for the person responsible and a status of Locked for others.

6. **Select** "View Graphic…", a new window appears.

Rt hand menu

Log

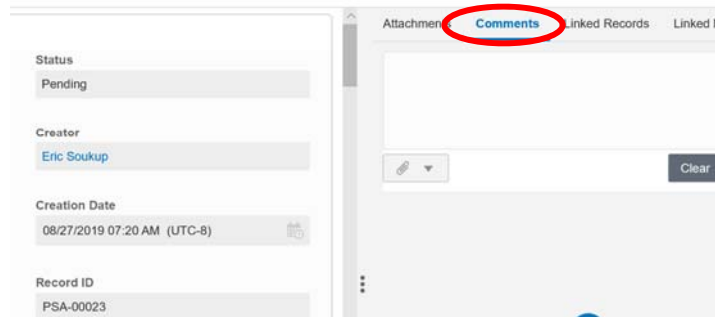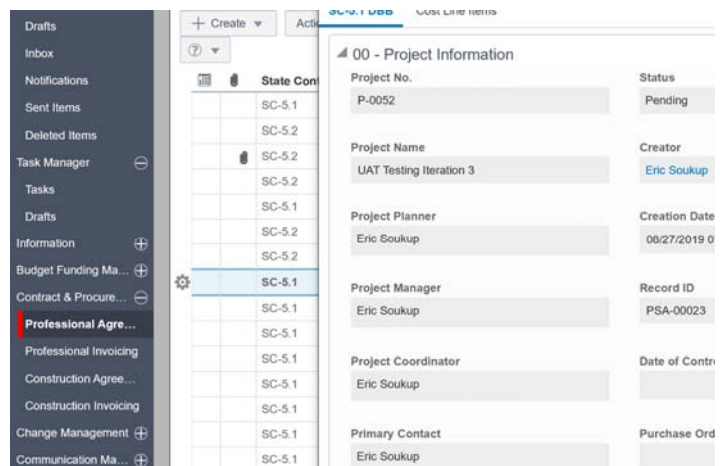| **Action By: All Users**	**Example**
7. The new window displays diagrammatical presentation of the workflow with the current workflow step highlighted in yellow and a bold border. 8. **Close** the record.	 END TASK

1.1.7 UTILIZING FORM FUNCTIONALITY (UPDATED: 4/2/20)

Goals	Shows how to attach documents to records/line items and add General Comments across all BPs in Unifier.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

| Action By: All Users	Example

1. Forms have a consistent look and feel across all processes once you know what to look for.

2. The left panel contains the form information. The ability to edit a field will change depending on which step a business process resides.

3. The right panel of every record will provide consistent interaction by the User via "Attachments", "Comments", etc.

4. **Navigate** to the record in question.

5. **Open** the record.

6. To **Add** general comments by selecting the "Comments" tab in the right pane.

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Action By: All Users	**Example**

7. **Select** "Add" (or type in the comments box depending on the BP type) enter comments and **select** "Post".
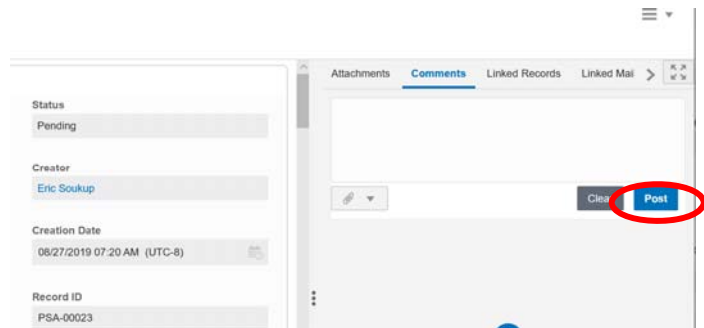
Note: Adding Comments at the creation step will include a "Hide" check box. By default, the box is checked and would need to be unchecked by the user if they want comments to be seen at the next step. Before sending the record to the next step in the business workflow, you can edit a comment or uncheck by 'Hide' box, by right-clicking on the pencil icon and selecting edit. Checking or unchecking the "Hide" box will not influence the rest of the comments in following steps.
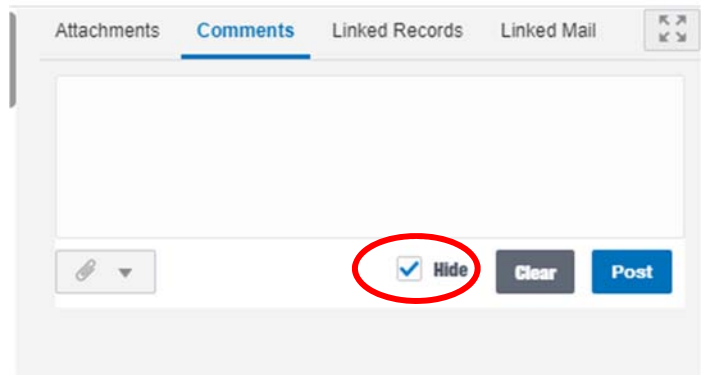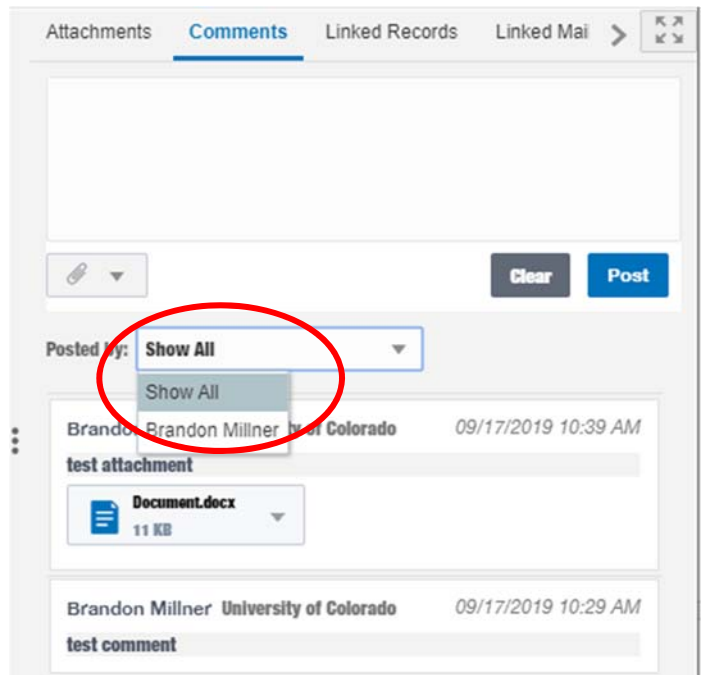
8. Comments show below the comment entry screen.

Note: Enter thorough comments that are meaningful to the other readers.

Note: Comments are not "threaded."

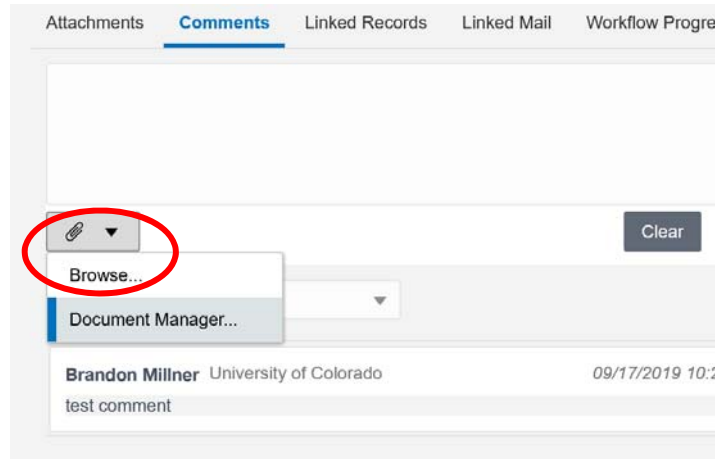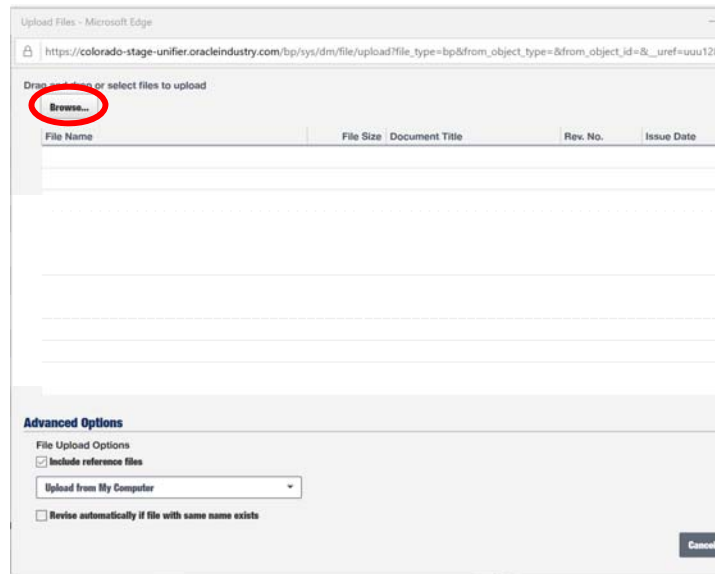Notes: Comments can be filtered by commenter.

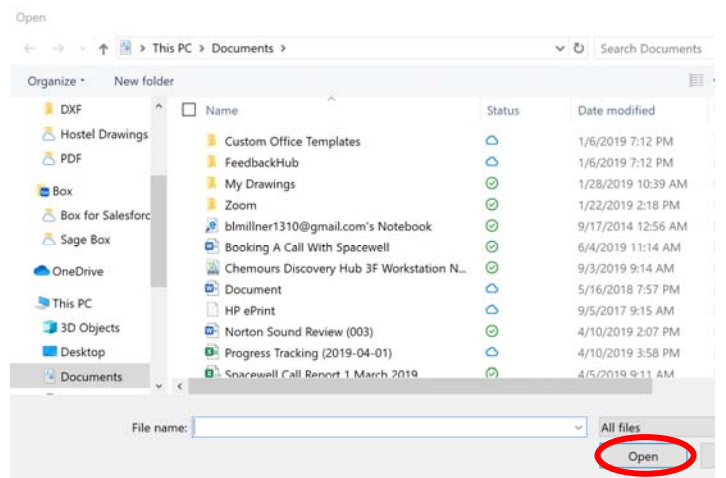| Action By: All Users	Example
9. While in Comments, can **Add** attachments by selecting the paperclip under the comment box and selecting "Browse" for local files. Note: Attachments can only be added in this manner to records that are not in terminal status (closed / approved); please see Step **Error! Reference source not found.** to add attachments to closed records, by using General Comments.	
10. **Select** "Browse" to locate a file to attach. 11. **Select** additional files to add multiple attachments, repeat as necessary. 12. **Add** a Document Title, Rev. No, and Issue Date to attachments.	
13. **Select** the file and **Select** "Open".	

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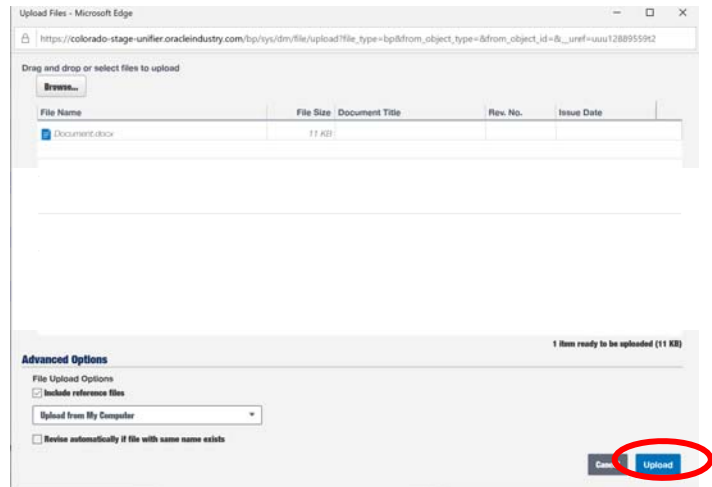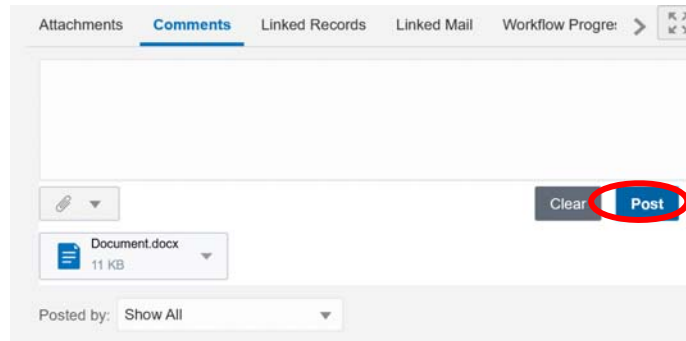| **Action By: All Users**	**Example**
14. **Verify** the file uploaded successfully. 15. **Select** "Upload" to add the file to your comment **Note: see help file section 1.2.3 on naming conventions.**	
16. **Select** "Post".	 END TASK

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1.1.8 WORKING WITH LINE ITEMS (UPDATED: 10/24/2019)

|	
Goals	How to tell if a form has "line items" and how they would be used.
Navigation	Home Screen
Action By	All Users
Pre-requisites	Logging In / Signing Out of Unifier
Related Files	None

Action By: All Users	Example

1. When in an Action Form, Line Items can be cost related or not. They appear to the right of the main form in the left panel of the screen.

2. **Navigate** to the record in question. For this example, we will use a Professional Agreement.

3. **Open** the record. The record opens in "Form" view.

4. **Select** the line item e.g. Cost Line Item link to open.

5. **Select** a line item to see a preview in the right panel of the screen.

6. **Double Select** to open a line item to edit.

   Note: The ability to edit a line item is not available in all steps of a business process.
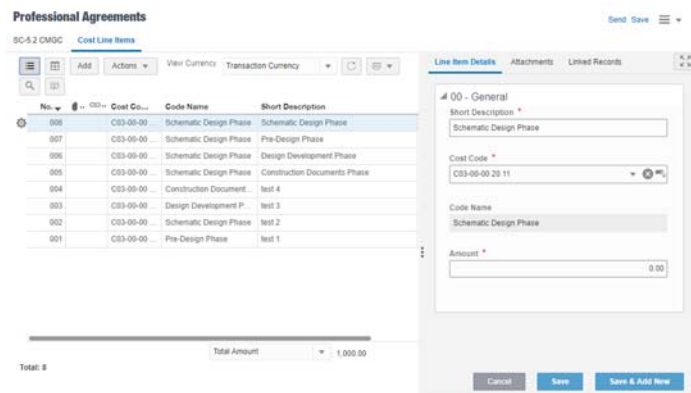
7. The grid icon opens "Grid" view, which allows line items to be added or edited in large quantities.
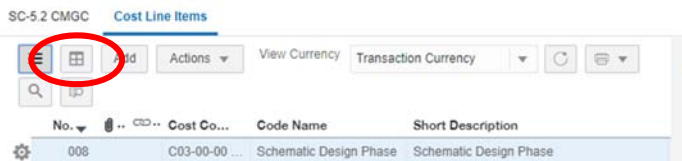
Action By: All Users	Example

8. Select Add to enter new items.

   Note: It is easier to add items in the "Form" view.

9. **Edit** entered items in the grid as necessary.

   Note: It is easier to edit multiple items in the grid view.

10. **Copy** line items to limit data entry. Select the gear icon next to selected line item to access **Copy.**

11. **Remove** items as necessary. Select the gear icon next to selected line item to access **Remove.**

12. **Select** Error Check to ensure all required fields are entered.

13. **Select** Save to save the grid view.

   Note: Note columns marked with an (*) in the grid as these are required fields.

14. It is also possible to import line items from a *.csv file type. If the business process allows it, the template will be enabled.

15. Within the record, **Select** the line series in the upper right corner and Export Line Item Template, a new window will open.

   Note: If there is no indicator for exporting a template, this process has not been configured for import. Contact your System Administrator if you think this is an error.

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Page **32** of **39**

Action By: All Users	Example

16. **Select** "Open" in the new window, this opens the line item template in excel.

    Note: Depending on your browser it will download to a different location and/or appear in the browser window, like other downloaded files.

17. **Enter** all line items into the template and **save** the file in the Unifier document manager.

18. **Enter** "D" (without quotes) under the column labeled D and "Line Items" (without quotes) under the column labeled Tab Name; these are required for import.
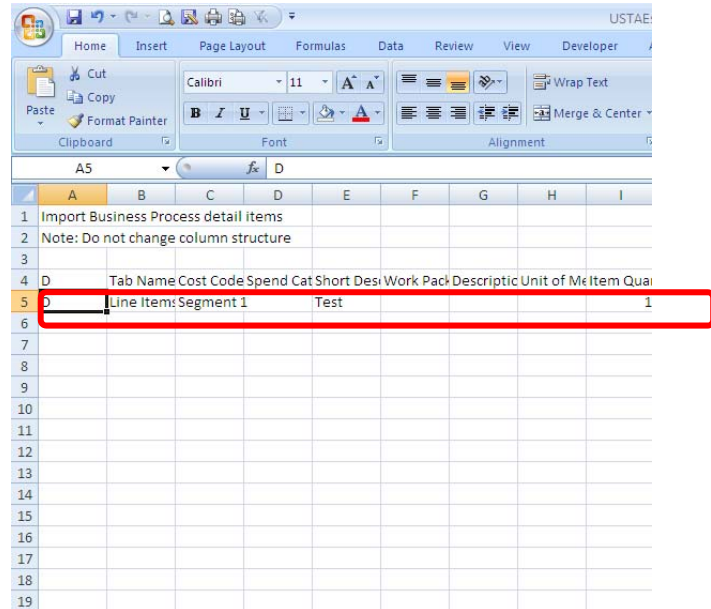
    Note: Note the required fields for the line item (as noted in the line item window) in addition to columns labeled D and Tab Name.

    Note: Do NOT change the layout of the template as this will generate errors.

    Note: "Line Items" may be named differently in different business processes; please see the tab the detail form, for the particular business process used.

19. **Select** "Import" from the Line Items portion of the record, this opens a new window.

20. **Select** "Browse" and locate the file you saved in the previous step.

21. **Select** "Open"

22. Select "OK"

23. This will import the line items into the record.
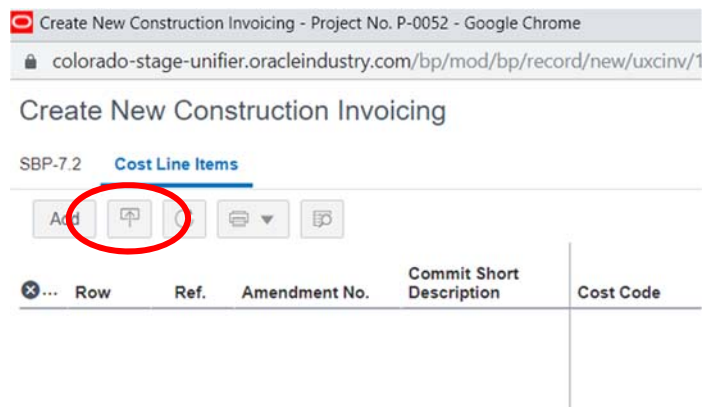
    Note: If there are any errors during import download the import errors for reference, fix the errors in the file, and import again.

END TASK

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1.2 DOCUMENT MANAGEMENT

1.2.0 INTRODUCTION (UPDATED: 4/9/2020)

Saving Documents in Unifier

Saving documents in Unifier projects can happen in many different ways:

1. The document is created by the business process record creation. This is the case for many things like contracts and amendments. The caveat here is that while Mike Turman and the working contracts group are working on the changes to these documents with OSA, the data needs to be entered into Unifier but the template from Meridian must be used for routing these forms. There is no change to the Meridian process. The template is copied to the project in Meridian and then uploaded to the record in Unifier. When all changes with OSA are made and the custom prints in Unifier updated to reflect those changes, the document will be generated out of the business process and saved to the document manager in Unifier automatically.

2. The document is uploaded to a business process record. This happens when the data is entered into the business process record in Unifier but the document is not generated automatically. This happens in cases like design review. In these cases, the document can be saved to either Unifier or Meridian and then attached to the record from there (or dragged from an email). If it's saved to Unifier, the process is outlined in the help files. Also, if this occurs, the document will have to be named using the same file suffix as Meridian. This naming convention is included in the help file. There is no change to the Meridian process.

3. If the document is not part of a business process but just part of the project, it can be saved to the document manager in Unifier or Meridian. If saved to Unifier, the process is outlined in the help file. There is no change to the Meridian process.

Editing Documents in Unifier

It is true that documents cannot be edited in the Unifier document manager and relies on native applications e.g. Word to update. While Unifier is a powerful tool for project management workflow and data, it is not a sufficient document manager for UCB. If a document in Unifier needs to be edited, there are a couple of ways to do it:

1. Download the document, edit it, re-upload it to the Unifier document manager as a new revision.

2. Download the document, edit it, upload as a new document.

3. Edit the document in Meridian. There is no change to the Meridian process of vertical versioning.

About Viewing Documents

Viewing Unifier projects happens in multiple ways also:

1. Viewing records and projects in Unifier is permissions based. Managers and Team Leads do have permissions to view everything on any project. Others have different permissions. For example, project managers and coordinators can only view projects (including all project records) they are working on directly. In order to view a project, you must be added to the project. Managers and Team Leads are part of a group "View All" and are automatically added to every project.

2. Viewing documents in Unifier can either be done by navigating the document manager or looking at a specific record. The document manager is structured exactly the same way as Meridian. The classes and subclasses are identical. If looking at a document in a Unifier record, the attachment is under "Attachments" on the right of the screen. Again, the document can only be viewed. If it needs to be changed, it will need to be downloaded, revised, and then re-uploaded as either a revision of the document or a new document.

About Meridian and Unifier

Meridian is a document manager that works using meta-data. Projects are not created in Meridian. You will not see a project in Meridian unless there is a document saved that is associated with a particular project. You can search for Unifier project documents under the UCB number in Meridian. If you don't see the UCB number (Unifier project) in Meridian, it is because no documents have been filed yet. There is no change to how Meridian functions to accommodate Unifier. There is, however, a new "Project Source" on the Meridian Wizard. This new project source is "Unifier" so that when a document is put into Meridian for a Unifier project, the person filing will select "Unifier" (for Unifier projects) instead of "Capital" (for CPs) or "Maintenance" (for PRs). The other thing of importance is that unless the location has been entered into the Unifier project, the Unifier project number will not be available in Meridian. The is because of the interface requirements.

One thing to note is that the interface between Meridian and Unifier is a one-way interface. Documents will go from the Unifier document manager to Meridian. Documents will never go from Meridian to Unifier. Also, please keep in mind that Meridian is the organization's approved document manager for retention and archival purposes. All project documents will eventually be in Meridian, even though they may live for a time in Unifier. The interface between the two systems is expected to be live by late spring 2020. The plan is for the systems to sync overnight, like Meridian and FAMIS do now.

1.2.1 VIEWING DOCUMENT STRUCTURE, PERMISSIONS AND CONTROL (UPDATED: 4/9/2020)

Goals	How to view and interact with the document structure. Includes different security options and metadata that is available.
Navigation	Project>Document Manager
Action By	All Users
Pre-requisites	Initial project creation.
Related Files	None

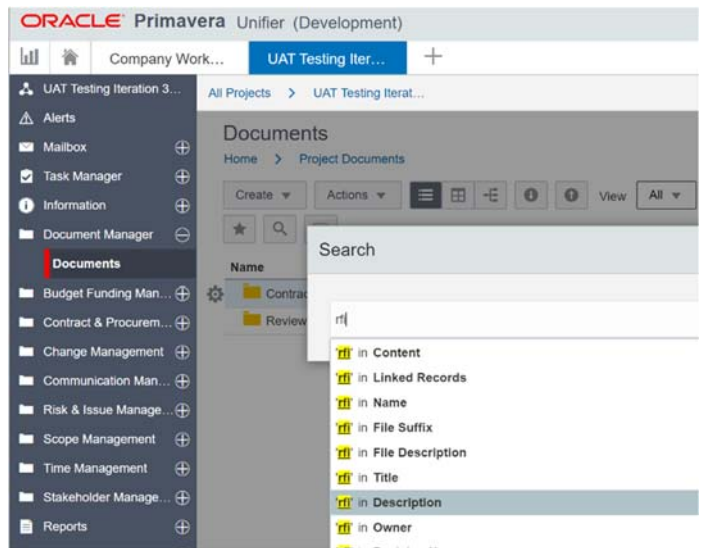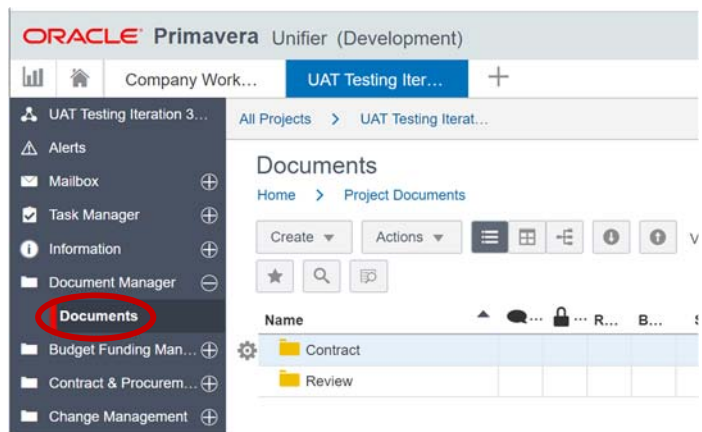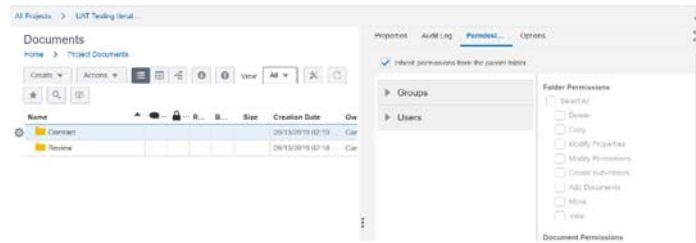| Action By: All Users	Example
1. **Navigate** to Project>Document Manager. 2. A list of standard folders created with the template will appear. Standard groups and permissions will also apply. 3. Folders have relationships with "sub-folders" with permission being inherited from parent folders by default. NOTE: Templates and other standard documents may be stored at the document manager at the UCB level.	
4. **Search** for documents using the magnifying glass icon. Search criteria includes related processes and any metadata associated with the document. Note: After a document is uploaded to document manager, Unifier begins to scan the content as well as the file name for search capabilities.	

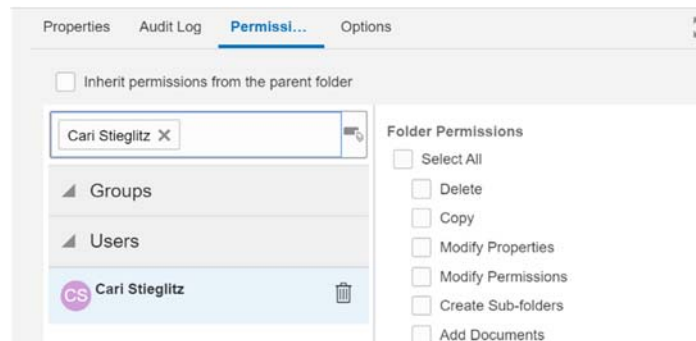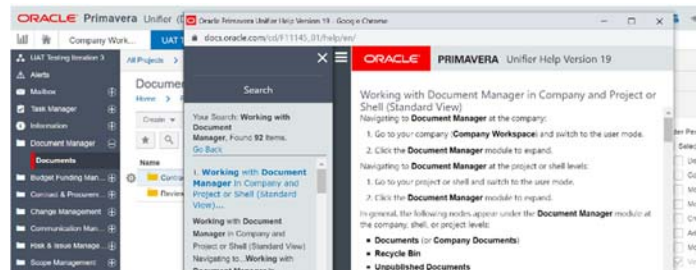| **Action By: All Users**	**Example**
5. To view permissions for a specific folder. Select that folder and then select Permissions from the right panel. Note: Permissions can be set by those that are enabled by permissions. If you don't have the right permissions, please contact your Company Administrator.	
6. By default, most folders will inherit permissions from the parent folder. Note: To learn more about copying and managing documents, select the (?) in the upper right corner next to favorites and **search** for "Copy a Document".	
7. **Enter** the search term "Working with Document Manager" to learn key features and abilities. Note: Clients and Vendors will not see the Document Manager, they will see those documents they need to see via the Business Process.	 END TASK

1.2.2 UPLOADING DOCUMENTS AND NAMING CONVENTIONS (UPDATED: 4/9/2020)

Goals	How to use naming conventions in Unifier.
Navigation	Project>Document Manager
Action By	All Users
Pre-requisites	Access to Document Manager
Related Files	None

Action By: All Users	Example

1. **Navigate** to Project>Document Manager and view the folder structure.

   Note the folder structure is similar to what is in Meridian.

   a. For example, a closeout plan should be uploaded to Closeout>Closeout Plan.

   Note direct uploads to Unifier should support current document management naming conventions used today e.g. class-sub-class.

2. After ensuring the name is correct, **navigat**e to the folder where the document should be located.

3. **Select** the "Up Arrow" to upload the document.

4. **Navigate** to the location on the folder or network where the document is stored.

5. **Select** "upload" to place the document from the computer into Unifier.

   Note: Contact your Project Coordinator or Project Manager if help is needed in understanding naming conventions.
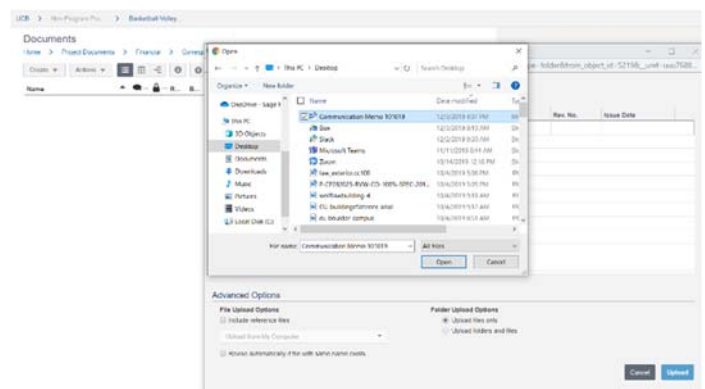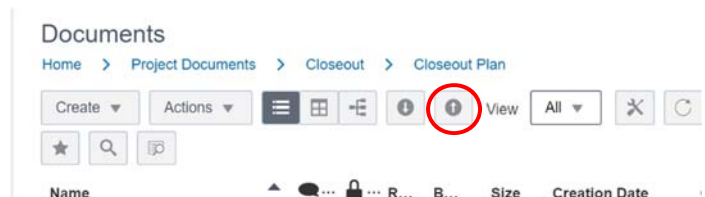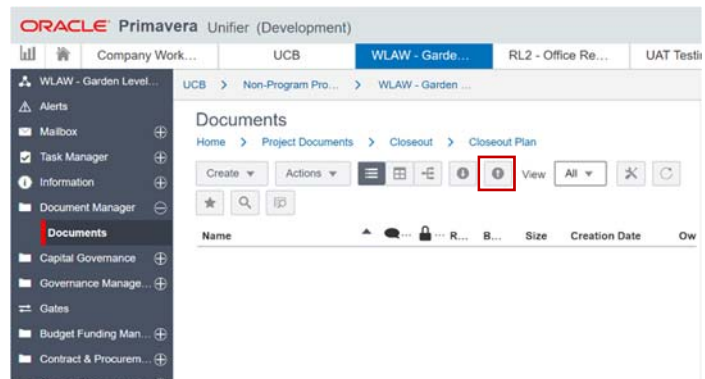
Action By: All Users	**Example**

6. Once uploaded, metadata will need to be added. To do this, find the document that was just uploaded.

   Note: The metadata is needed only for documents uploaded directly to Unifier as the processes will automatically populate this. Metadata is used to map the integration into Meridian.

7. The Properties screen opens. Enter the required "metadata", or information about the document.

   a. File Suffix: Use the Meridian file suffix standard.

   b. Other fields are not required or are automatically populated.

8. **Select** "Save" to save the metadata.

Properties | Linked Records | Audit Log | Permissions | Options

◢ Properties

Name
Professional Agreement Modifications_PAM-00002_CONTDES-01.pdf

Location
/Contract/SC-5.1 Architect-Engineer Agreement-DBB/--PAM-00002-CONTDES

File Suffix *

Pub No.
1

Doc Date

Doc Amount
0.00

Owner
Eric Soukup

Upload By
Eric Soukup

Creation Date
03/10/2020 08:11 AM (UTC-8)

Size
NaN

Title

Revision No.

Issue Date
MM/DD/YYYY HH:MM AM

Cancel | Save

END TASK