

BUILD **Boulder**

**PROJECT DELIVERY SYSTEM (PDS) TRAINING
SECTION 03 - DELIVERY**
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REVISION TRACKING

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Disclaimer

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3.0 PROJECT DELIVERY INTRODUCTION

3.0.0 INTRODUCTION

Welcome to Unifier delivery. Our new Project Delivery System (PDS) will support our project teams from idea to closeout. This system is intended to make us more streamlined in how we deliver projects, while giving our project teams one source of the truth throughout. In 2020, we will be inviting Vendors into our system, further supporting a cohesive and streamlined way of delivering.

The following chart shows a high-level summary of our phases and how the system will be used across those phases.

Help File Name	Initiation	Feasibility	Programming	Design Phase	Construction	Commissioning	Closeout	Capital Exceptions?
Creating a Proposal								
Adding Vendors not in Marketplace								
Submitting a Request Application								
Completing Capital Governance before Design								
Completing Capital Governance after Design								
Closing a Project								
Viewing Funds at the Portfolio Level								
Creating an Initial Budget								
Completing Financial Closeout								
Allocating Funds								
Requesting Initial Funds								
Requesting Changes to Funds								
Viewing the Cost Breakdown Structure and Cost Sheet								
Managing Funding at the Project Level								
Managing Budget Changes								
Managing Budget Transfers								
Issuing a Change Order Bulletin								
Completing a Change Order Proposal								
Modifying a Construction Agreement								
Modifying a Professional Agreement								
Creating and Updating Action Items								
Creating Agendas and Meeting Minutes								
Completing ASI's								
Submitting a Request for Information								
Submitting a Request for Substitution								
Viewing a Schedule of Values (SOV)								
Creating a Construction Agreement								
Invoicing a Construction Agreement								
Issuing a Notices to Proceed (NTP)								
Creating a Professional Agreement								
Invoicing a Professional Agreement								
Issuing an Authorization to Bid								
Managing Bids								
Managing RFPs								
Managing RFQs								
Viewing Cash Flow								
Viewing BOB (Actuals) in Unifier								
Completing the Project Charter								
Managing Gates and Approvals								
Managing Key Project Information								
Managing Risks and Issues								
Entering Specification Sections								
Completing Punch Lists								
Creating a Submittal Package								
Routing a Submittal for Approval								
Completing Commissioning								
Completing a Design Reviewing								
Completing Programming								
Completing a Feasibility Study								
Managing the Project Milestone Schedule								

At the point we know the delivery method, we start to work with Unifier templates that focus only on how we intend to complete the work. Because we start tracking data based on delivery, we ask only for the pertinent data related to your project. By gathering the data, the system can generate reports and state forms as an output (not another redundant step). This reduced the time you spend on managing data while enabling more efficient delivery practices.

Another benefit is that we maintain the same project identified throughout the project lifecycle. Reporting and rollup maintains lifecycle costs for the project and automatically carries our information forward past programming and into design.

3.1 GOVERNANCE

3.1.0 INTRODUCTION

Governance covers the important overarching aspects of integrated project management. Tasks as part of governance set the project up for success and tie key components like cost and scope together.

This section also covers an important part to the way we deliver, control of our projects through gate management and reviews.

3.1.1 MANAGING KEY PROJECT INFORMATION (UPDATED: 02/11/2020)

- Goals** How to manage the key information on a project including location data.
- Navigation** Project>Information>General
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Setting preferences and receiving notification of a new proposal or project.
- Related Files** None.

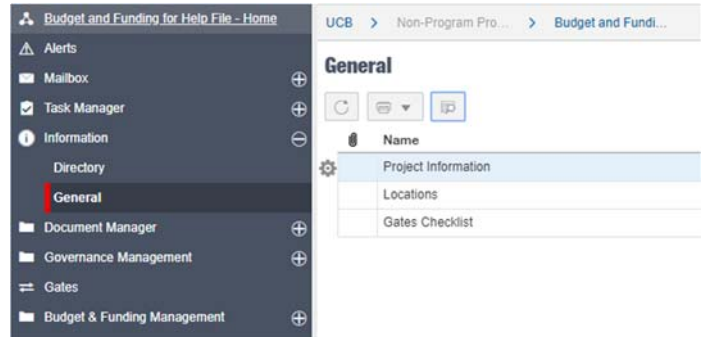
Action By: PM / PC / Planner

Example

1. **Navigate** to Project >Information>General where Project is the name of the specific project you are updating.

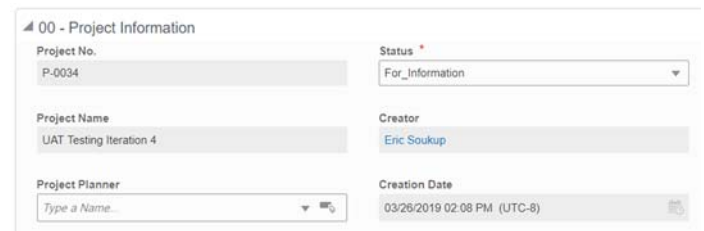
2. **Select** Project Information to open the content.

Note: Opening processes can be done via a double select or via the settings icon.



3. If all fields are grey, **select** "Edit" to start editing the information.
4. In the 00 - Project Information block, **enter** the contacts for each role.
 - a. Start typing a name will show available options.
5. Optionally, **use** the select icon in the right of the field to pull up a list of available names.

Note: Completing names here allows for auto-population of names onto forms and processes reducing times you need to enter data.



Action By: PM / PC / Planner

Example

6. **Complete** the 00 – Project Information block.
7. **Enter** the FAMIS Project No.
8. **Enter** the Speed Type for this project.

00 - Project Information

Project No. P-0034	Status * For_Information
Project Name UAT Testing Iteration 4	Creator Eric Soukup
Project Planner AriAnne Gilliland	Creation Date 03/26/2019 02:08 PM (UTC-8)
Project Manager AriAnne Gilliland	Record Last Update Date 03/29/2019 12:31 PM (UTC-8)
Project Coordinator AriAnne Gilliland	Record ID PI-00001
Primary Contact AriAnne Gilliland	Project Type Non-Capital
	FAMIS Project No. 12345678
	Speed Type

9. Under 01 – Project Details, **check** all the boxes that apply.

01 - Project Details

- Antennas (ANT)
- Arts & Sciences (AS)
- Capital Renewal (CR)
- Classrooms (CSCP)

10. Under 02 – Description, **enter** a short description for the project.

Note: This field is limited to 250 characters.

02 - Description

Description

Project Description from Project Information

Action By: PM / PC / Planner

Example

11. **Note** 03 – Locations is blank and not editable. We will complete this information after Project Information is complete.

12. Under 04 – Building Proctor/Manager, **enter** at least one name for this project.

13. Under 05 - Project Area, **enter** the forecasted new and renovated GSF for this project.

Note: This information should be updated as the project progresses, and more information is known.

14. **Select** Submit in the upper right corner to save and close the Project Information form.

Action By: PM / PC / Planner

Example

15. Under the same location of Project >Information> General, **select** Locations to open location data for the project.
16. **Select** Edit to start editing location information. Some information will be filled in. Edit or enter new information.

Note the status is set to Active.

Note the names entered in Project Information are now populated automatically into this form.

17. **Enter** the primary building location information.

Note the following exceptions to the primary location:

SITE: Can be chosen when the work is not specific to a building, such as exterior projects.

MULTI: For work that affects multiple buildings as the primary work. Go to Locations tab, add every location.

If the project is a new building do not select until such time as a building number is developed and added to Unifier.

18. **Enter** the primary Floor and Primary room if applicable.
19. **Enter** the latitude and longitude to enable the project to show up on the map dashboard.

20. **Select** Submit in the upper right corner to save and close the Locations form.

Note: Returning to the project information form will now show the location data populated.

Note: If there are additional floors, rooms, or buildings besides the Primary location, proceed to step 23.

Action By: PM / PC / Planner

Example

Locations

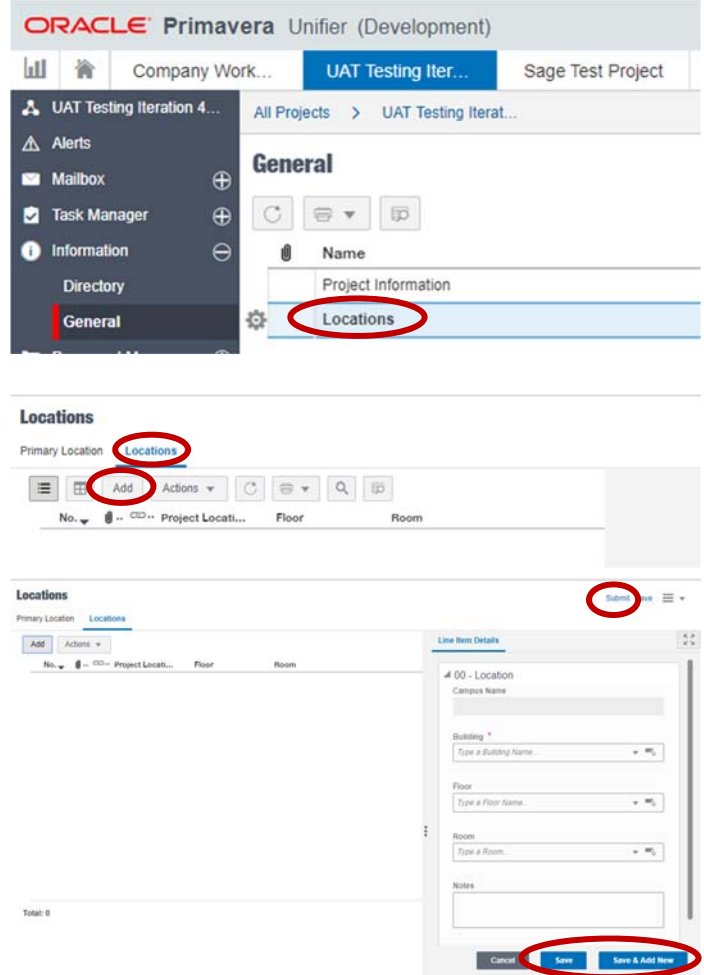
- 21. After Primary Location, go to Locations tab.
- 22. **Select** Locations to open the content.

Note: Opening processes can be done via a double select or via the settings icon.

- 23. **Select** Locations at the top of the window.
- 24. **Select** “Add” to open the 00 – Location window.
- 25. **Enter** data as required and known.
- 26. **Select** “Save”

Note: If this is a MULTI location project you will **Select** “Save & Add New” for each location.

- 27. **Select** “Submit”



END TASK

3.1.2 MANAGING GATES AND APPROVALS (UPDATED: 04/16/2020)

Goals How to manage the gates and approvals as the project progresses. This includes automated gate advancement. With approved exceptions, you can bypass a gate condition.

Navigation Project>Information>General>Gates Checklist
Project>Gates

Action By Project Team

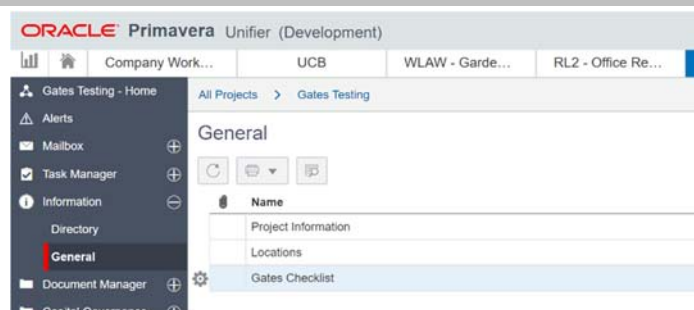
Pre-requisites Each gate has a series of deliverables or business processes to complete.

Related Files None.

Action By: Project Team

Example

1. **Navigate** to Project>Information>General where Project is the name of the specific project you are updating.
2. **Select** “Gates Checklist” to open.
3. **Select** “Edit” to start editing. Note, for the very first time, it is in the submit mode.



Note: The Gates Checklist is not a workflow process and will be opened and edited as the project progresses.

Note that dates and answers to requirements should be populated when the answer is known, and tasks are complete, and this example shows a project that has progressed though gates already.

4. In 00 – Project Information, **enter** in answers to requirements as they are known.

Note: Fields will be editable, or not editable, based on whether a project is Capital or Non-Capital.

The screenshot shows the '00 - Project Information' form. It contains the following fields:

Project Number	UCB000001	Creator	Eric Soukup
Project Name	IT4 Proposal UAT Testing	Creation Date	2019-10-02 11:13 AM (UTC-7)
Project Planner	Eric Soukup	Record ID	GCL-00001
Project Manager	Eric Soukup	Project Type *	Capital
Project Coordinator	Eric Soukup	Contracting Method *	Design/Bid/Build
Primary Contact	Eric Soukup		

Action By: Project Team

Example

- In 01 – Initiation, **note** that the gates are verified through the other business processes.

Note: These processes will be viewed later in this help file.

- In 02 – Feasibility, **enter** in answers to requirements as they are known.

Note: If not known at this time, review requirements but do not change answer.

- In 03 – Programming, **enter** in answers to requirements as they are known.

Note: Programming will be greyed-out for a non-capital project, as this phase is not used.

- In 04 – Concept Design, **enter** in answers to requirements as they are known.

01 - Initiation
The Initiation Phase gates are verified through business processes.

02 - Feasibility

Commissioning Required? No	Internal or External? [Greyed out]
Design Charrette Approval at Feasibility [Greyed out]	Design Charrette Approval Date at Feasibility [Greyed out]
Owner's Schedule Current at Feasibility Select	

03 - Programming

Design Review Board - Programming Approval Yes	Design Review Board Programming Approval Date 10/03/2019
Design Charrette Approval at Programming Yes	Design Charrette Approval Date at Programming 10/03/2019
ECD Requested (Capital) Yes	ECD Requested Date (Capital) 10/03/2019
Owner's Schedule Current at Programming Yes	

04 - Concept Design

Design Review Board - Concept Approval Yes	Design Review Board Concept Approval Date 10/03/2019
Design Charrette Approval at Concept Yes	Design Charrette Approval Date at Concept 10/03/2019
GeoTech Report Received (Capital) Yes	
Site Survey Received (Capital) Yes	Site Survey Received Date (Capital) 10/03/2019
Owner's Schedule Current at Concept Yes	

Action By: Project Team

Example

9. In 05 - Schematic Design, **enter** in answers to requirements as they are known.

05 - Schematic Design

Design Review Board - SD Approval Yes	Design Review Board SD Approval Date 10/03/2019
Design Charrette Approval at SD Yes	Design Charrette Approval Date at SD 10/03/2019
Initial SC-4.1 Signed/Approved Yes	
ECD Requested (Non-Capital)	ECD Requested Date (Non-Capital)
GeoTech Report Received (Non-Capital)	
Site Survey Received (Non-Capital)	Site Survey Received Date (Non-Capital)
Board of Regents Approval Yes	Board of Regents Approval Date 10/03/2019

10. In 06 – Design Development, **enter** in answers to requirements as they are known.

06 - Design Development

Design Review Board - DD Approval Yes	Design Review Board DD Approval Date 10/03/2019
Design Charrette Approval at DD Yes	Design Charrette Approval Date at DD 10/03/2019
Room Numbering Assignments Received Yes	
Owner's Schedule Current at DD Yes	

11. In 07 – Construction Documents, **enter** in answers to requirements as they are known.

07 - Construction Documents

Room Numbering Assignments Approved Select	
Authorization to Bid Issued (SBP-6.10) Select	
Owner's Schedule Current at CD Select	

12. In 08 – Pre-Construction, **enter** in answers to requirements as they are known.

08 - Pre-Construction

ECD Signed Select	ECD Signed Date MM/DD/YYYY
Permits Issued (or NA) Select	
Owner's Schedule Current at Pre-Construction Select	

Action By: Project Team

Example

13. In 09 - Construction, **enter** in answers to requirements as they are known.

09 - Construction

Equipment Labeling Complete (or NA)
Select

Substantial Completion Issued
Select

Warranty Contact List Received
Select

Owner's Schedule Current at Construction
Select

Date of Substantial Completion
MM/DD/YYYY

14. In 10 - Closeout, **enter** in answers to requirements as they are known.

10 - Closeout

O&Ms Received (or NA)
Select

Warranties Received (or NA)
Select

Notice of Settlement Advertised
Select

No Verified Claims (or NA)
Select

Notice of Acceptance Issued
Select

6 Mo Walk Scheduled?
Select

Date of Notice of Settlement
MM/DD/YYYY

Date of Notice of Acceptance
MM/DD/YYYY

Date of 6 Mo Warranty Walk
MM/DD/YYYY

15. In 12 – DO NOT EDIT THIS, **change** the Status to “Completed” ONLY if the Project and Gates Checklist are truly complete.

Note: “Status” to remain in Pending status until truly complete.

Note: Changing the “Status” to “Completed” is a terminal status for Gates Checklist. There is no way to retrieve the record once it is in a terminal status.

12 - Do Not Edit

DO NOT EDIT THE STATUS

Status *

Pending

Completed

Pending

16. **Select** “Submit” to save and close the checklist.

Action By: Project Team

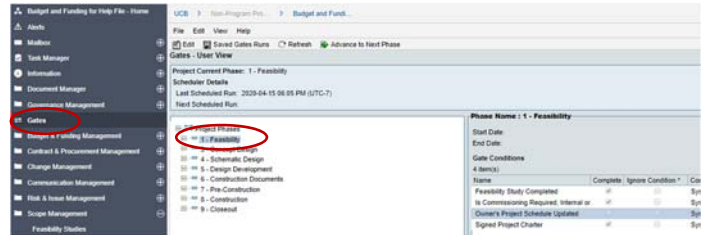
Example

17. **Navigate** to Project>Gates and select “Feasibility”.

18. **View** the gates progress.

Note: The conditions that the system is monitoring are automated and not available for editing.

Note: Permissions are available for the PM, PC, or Planner to bypass gate requirements on an exception basis. When this is done, a general comment must be added to denote why the exception was made.



19. At any point / gate in the project and if project exceptions apply, manually **bypass** a gate condition.

- a. If no exceptions, skip to end and continue to enter gate checklist and activities as needed.

20. To ignore a condition, **highlight** the condition.

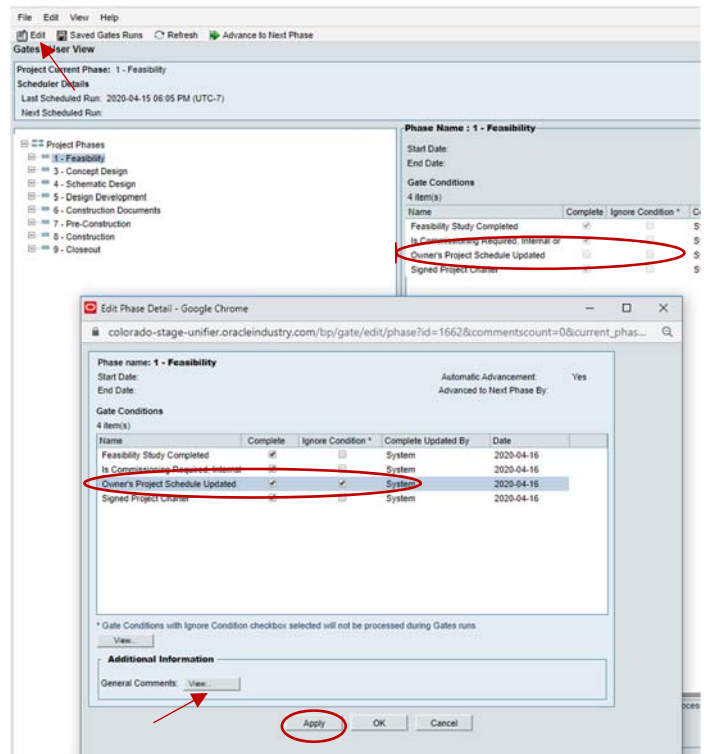
21. **Select** “Edit”

- a. A new window opens

22. **Check** both the “Complete” and “Ignore Condition” boxes

23. **Select** “Apply”

24. **Select** “View” to open the “Add New Comments” window.



Action By: Project Team

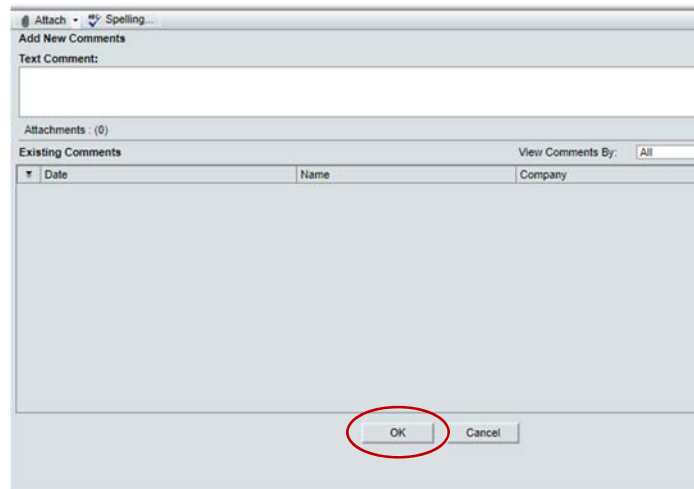
Example

25. **Enter** comments in the text box as to why the condition was ignored.

Note: It is good practice to note the condition that is the subject of your comment.

26. **Select** “OK”.

27. In the previous screen **select** “OK” to close the window.

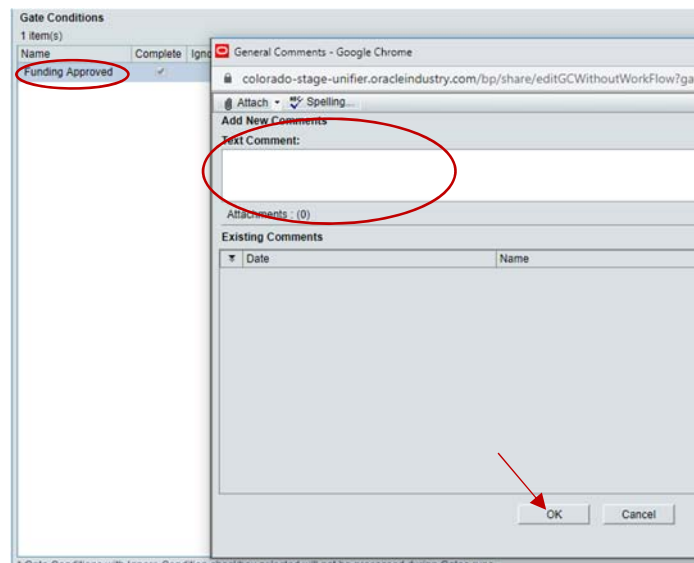


28. Optionally to enter comments for a specific gate item, **highlight** the item then **select** “View” under “Additional Information”.

29. **Note** a new window opens to enter your comments in “Text Comment” box.

30. **Select** “OK”

31. **Note** if comments have been added, an icon appears in the “Additional Information” field.



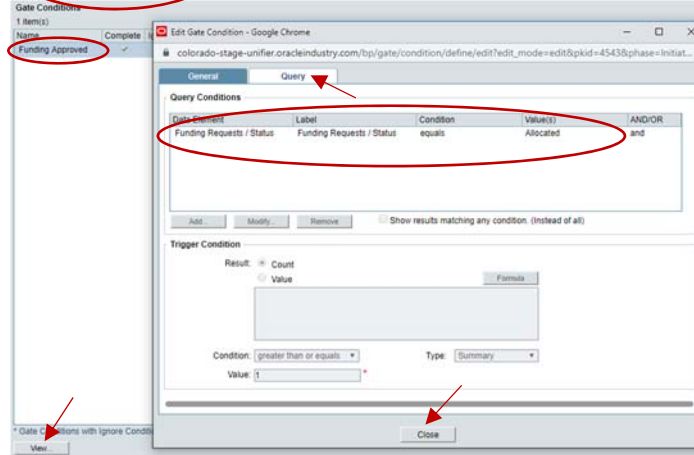
32. **Select** each gate to review conditions and requirements. Note that they are a combination of the checklist and the business processes.

33. **Highlight** a gate item.

34. **Select** “View” to open a new window.

35. **Select** “Query” tab to see the requirements.

36. **Select** “Close” to close the window



Action By: Project Team

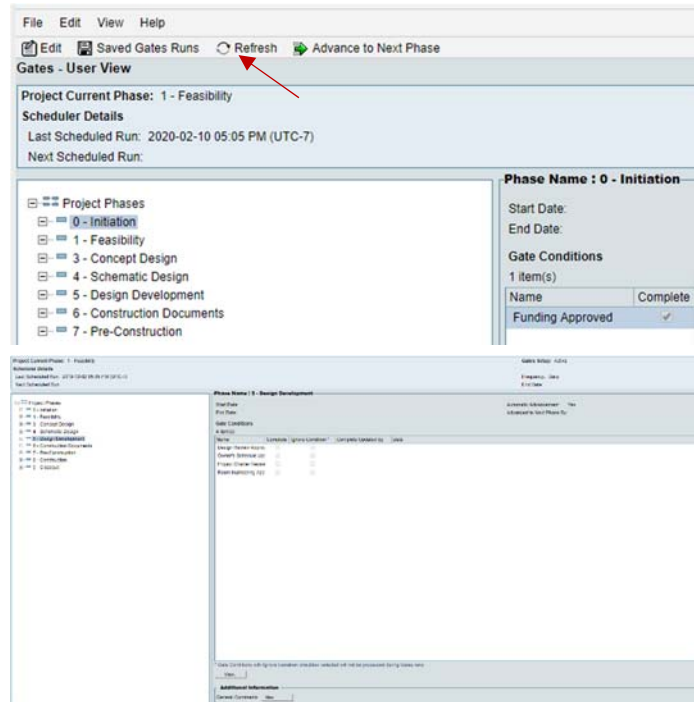
Example

37. **Return** to each gate checklist or gate condition when close to completing phase deliverables or as a new phase starts.

Note: Select on the “refresh” icon to update information more quickly than the system may update automatically.

38. **Continue** to update and **monitor** as the project progresses.

Note: Example on right shows a completed Design Development gate.



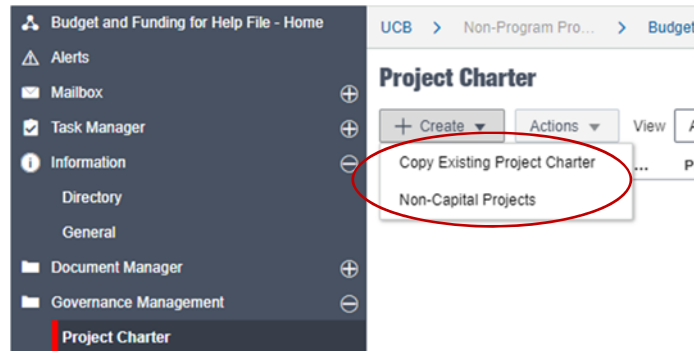
END TASK

3.1.3 COMPLETING THE PROJECT CHARTER FOR NON-CAPITAL (UPDATED: 02/17/2020)

- Goals** How to complete a non-capital project charter.
- Navigation** Project>Governance Management>Project Charter
- Action By** Project Team
- Pre-requisites** Gate requirement depending on the project type
- Related Files** None.

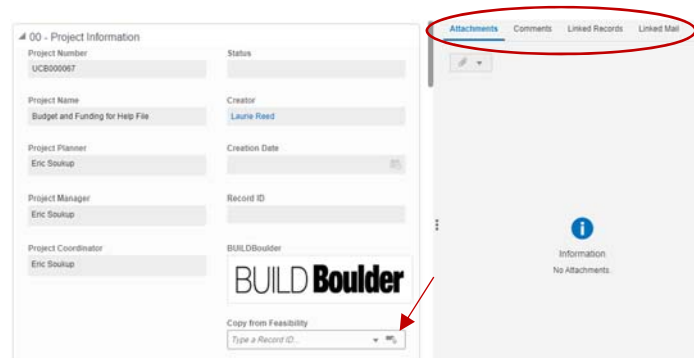
Action By: Project Team **Example**

1. **Navigate** to Project>Governance Management>Project Charter.
2. **Select** “Create”.
3. **Select** “Non-Capital Projects” workflow.
4. Optionally, if you already have an approved charter and need to revise it, **select** “Copy Existing Project Charter”.



Note: Every step other than a revision step will have a task duration of 3 days.

5. In 00 – Project Information, note greyed out fields will auto-populate as appropriate.
6. **Select** the desired feasibility record from the picker to auto-populate previous information in remaining blocks.
7. Optionally **add** “Notes”, “Attachments”, “Comments”, etc. using the buttons indicated to the right.




Action By: Project Team

Example

8. In block 01 – 05, **enter** data.
9. **Note** greyed-out fields are read-only and will auto-populate. “Approval Date” will auto-populate when workflow has reached Approved status.
 - a. Red asterisk fields are required.

Note: For Non-Capital projects, some information will auto-populate from the feasibility phase initial consultation option that is selected in Block 00. Edit as necessary in the project charter.

▲ 01 - General Information

Revision	0.00	Approval Date	
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▲ 02 - Project Goals and Objectives

Why is this project being done? What is the problem being solved by this project? How is this relevant to campus and/or departmental strategic goals?

Project Goals and Objectives *

▲ 03 - Project Priorities and Scope

List project priorities (timeline, budget, task, etc) and delineate them in order of importance. This section can clarify the scope by describing specific elements excluded from project scope. Identify New Construction GSF/ASF, Renovation ASF, ESCO, Deferred Maintenance.

Project Priorities and Scope *

▲ 04 - Key Stakeholders and Their Roles

Identify key decision makers, their department, position and (if necessary) their role and authority as it applies to this project. Include sponsor, stakeholders, Planner, Project Manager, etc.

Key Stakeholders and Their Roles *

▲ 05 - Deliverables

List anticipated project deliverables, ie: Feasibility Study, Program Plan, Design Documents, construction at completion, and due dates.

Deliverables *

Action By: Project Team

Example

- 10. In block 06 -11, **enter** data for red asterisked fields.
- 11. **Select** the assumed contracting Method from the pull-down.
 - a. Options are: Design/Bid/Build, CMGC, Design/Build-LS, and Design/Build-GMP.

▲ 06 - Assumptions
Describe project assumptions, which may include the availability of specific resources, information, funding and collateral projects.

Assumptions *

▲ 07 - Constraints
What limitations or boundaries have been discussed? This might include scope, budget/funding limits, and regulation or desired quality standards.

Constraints *

▲ 08 - High Level Risks
Identify challenges, obstacles, risks or threats that may hinder the project.

High Level Risks *

▲ 09 - Budget
List project budget range, source of funds.

Budget *

▲ 10 - Schedule
Provide schedule range or milestones if possible.

Schedule *

▲ 11 - Contracting Method
Contracting method, project process(es).

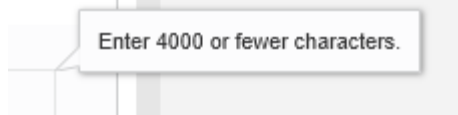
Contracting Method *

Contracting Method Rationale *

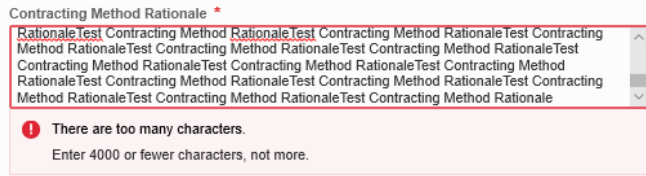
Action By: Project Team

Example

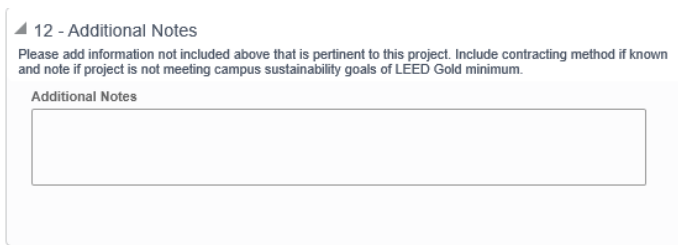
Note: Selecting the field will show character limit via a pop-up balloon.



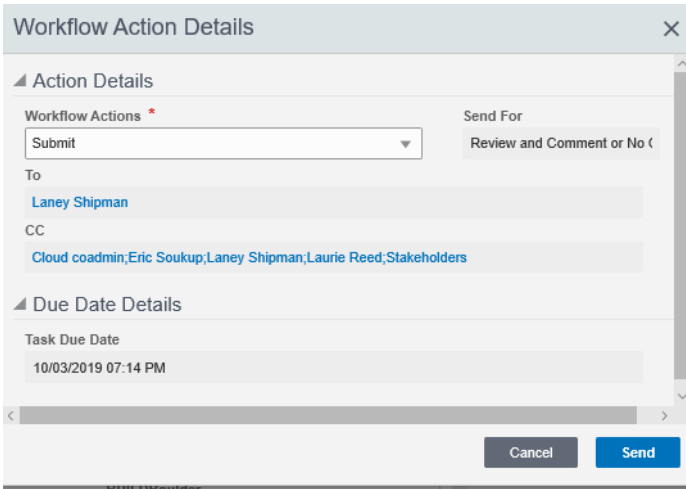
These fields will allow you to keep typing even if the character limit is exceeded. If exceeded an error message will appear when out of the text box.



- 12. **Note** in Block 12 – “Additional Notes”, is an editable field and can be filled in as needed.



- 13. **Select** “Send” in the upper right corner of the form for Workflow Action Details to appear.
 - a. Optionally **select** “Save” to continue working on later.



- 14. **Review** Workflow Action Details and applicable CC’d users.

- 15. **Select** “Send”.

Note: You will notice a task duration of 3 business days.

Note: This review step allows for a period of comments and edits prior to sending for final approvals. It is expected the charter is “correct” prior to send for approvals.

Action By: Project Team

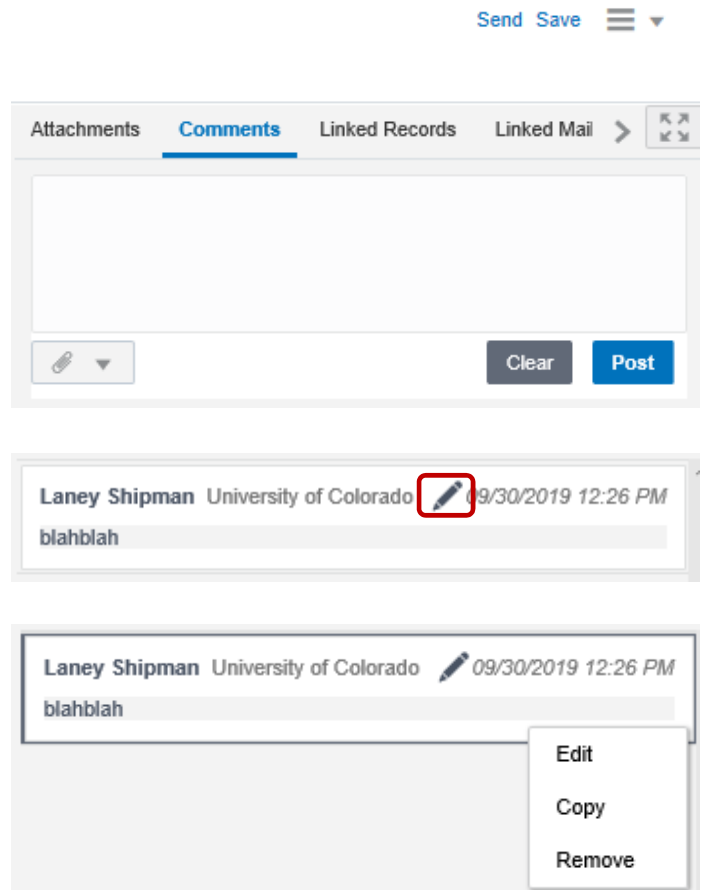
Example

16. The assignee(s) will see the record in Tasks or under Project Charter. Select the record to open.
17. This is a review step; all fields are set to read-only.
18. In the upper right-hand corner of the form **select** "Comments". Enter your comments in the "Comments" box. Attachments can also be added from pulling-down the contextual menu in the lower left-hand corner. **Select** "Post" to add comments.
19. The comment will appear below the "Comments" box. The pencil icon shows that your comment is in draft mode and editable. To edit, copy, or remove a comment select the comment (a dark grey border will appear around the comment) and right-click the pencil icon. A contextual menu will appear with the options listed above.

Note: When you add a new comment to a business process form, it remains as a draft until you send the form to the next step in the workflow.

Note: Attachments can be added from two options; Browse (from computer) or Document Manager.

Note: The Comments box does not recognize formatting. Even if you use the Enter key to create a new line it will not show up in the final comment.



Action By: Project Team

Example

20. Send for Revise Charter or Consensus.
 - a. If sent for “Revise Charter”, comments added in previously will be shown in the “Comments” box. The record can be resubmitted or cancelled.
 - b. If resubmitted the record will route back to “Review and Comment” or “No Comment” step. If cancelled the record would be terminated.

The screenshot shows a 'Workflow Action Details' dialog box. Under the 'Action Details' section, there is a 'Workflow Actions' dropdown menu with a red circle around the 'Revise Charter' and 'Consensus' options. To the right, there is a 'Send For' field. At the bottom right, there are 'Cancel' and 'Send' buttons.

21. **Open** the record in Tasks or under Project Charter.
22. **Review** comments under “Comments” box and add additional ones if needed.
23. **Send** for “Consensus”.

Note: You will notice a task duration of 3 business days.

Note: It is anticipated at this step that everyone involved has accepted the final edits and is now “approving” the final version. This step constitutes “signing -off” on the project charter.

The screenshot shows a 'Workflow Action Details' dialog box. The 'Workflow Actions' dropdown menu now has 'Consensus' selected. The 'Send For' field is set to 'Approval'. The 'To' field is populated with 'Cloud coadmin, Eric Soukup, Laney Shipman, Laurie Reed, Stakeholders'. The 'CC' field is empty with a placeholder text 'Start typing for suggestions...'. Under the 'Due Date Details' section, the 'Task Due Date' is '10/03/2019 08:03 PM'. At the bottom right, there are 'Cancel' and 'Send' buttons.

Action By: Project Team

Example

- 24. Stakeholders can open the record in Tasks or under Project Charter.
- 25. In Workflow Action Details the record can be **sent** for “Approve” or “Reject with Comments”. If “Reject with Comments” the record will re-route to the “Revise Charter” step and sent through the workflow again or cancelled.
- 26. **Send** for “Approve”.

Note: The **Approval Date** will auto-populate in the view form.

Workflow Action Details

▲ Action Details

Workflow Actions *
Approve

Send For
End

CC
Cloud coadmin × Eric Soukup × Laney Shipman × Laurie Reed × Stakeholders ×

Cancel Send

END TASK

3.1.4 COMPLETING THE PROJECT CHARTER FOR CAPITAL (UPDATED: 10/24/2019)

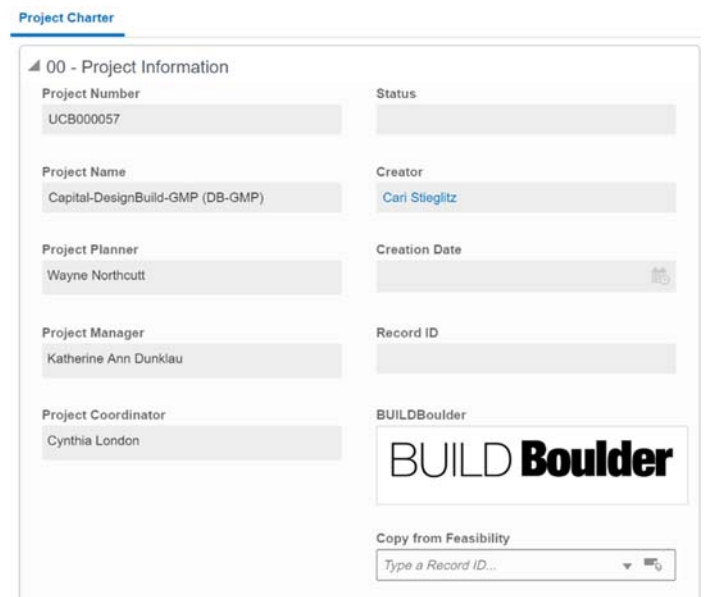
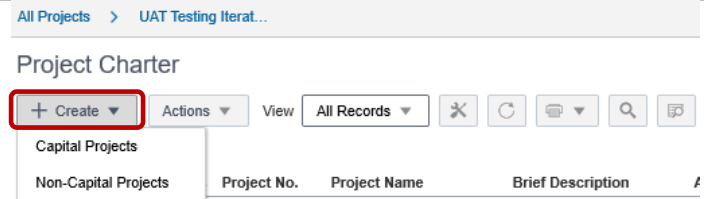
- Goals** How to complete a capital project charter.
- Navigation** Project>Governance Management>Project Charter
- Action By** Project Team
- Pre-requisites** Gate requirement depending on the project type
- Related Files** None.

Action By: Project Team

1. **Navigate** to Project>Governance Management>Project Charter. **Select** “Create”.
2. **Select** “Capital Projects” workflow.

Note: Every step other than a revision step will have a task duration of 3 days.
3. In 00 – Project Information, **note** greyed out fields will auto-populate as appropriate.
4. **Select** the desired feasibility record from the picker to auto-populate previous information in remaining blocks.
 - a. Optionally add Notes, Attachments, Comments, etc. using the buttons indicated to the right.

Example



Action By: Project Team

Example

- 5. **Note** in block 01 – 05, greyed-out fields are read-only and will auto-populate. Red asterisk fields are required.
- 6. **Note** “Approval Date” will auto-populate when it has reached Approved status.

▲ 01 - General Information

Revision	0.00	Approval Date	
----------	------	---------------	--

▲ 02 - Project Goals and Objectives

Why is this project being done? What is the problem being solved by this project? How is this relevant to campus and/or departmental strategic goals?

Project Goals and Objectives *

▲ 03 - Project Priorities and Scope

List project priorities (timeline, budget, task, etc) and delineate them in order of importance. This section can clarify the scope by describing specific elements excluded from project scope. Identify New Construction GSF/ASF, Renovation ASF, ESCO, Deferred Maintenance.

Project Priorities and Scope *

▲ 04 - Key Stakeholders and Their Roles

Identify key decision makers, their department, position and (if necessary) their role and authority as it applies to this project. Include sponsor, stakeholders, Planner, Project Manager, etc.

Key Stakeholders and Their Roles *

▲ 05 - Deliverables

List anticipated project deliverables, ie: Feasibility Study, Program Plan, Design Documents, construction at completion, and due dates.

Deliverables *

Action By: Project Team

Example

7. **Enter** information in blocks 06 -11.

Note: Hovering over a field will show character limit via a pop-up balloon. These fields will allow you to keep typing even if the character limit is exceeded.

8. **Select** the “Contracting Method”.

- a. **Note** the pull-down has the available options:
Design/Bid/Build, CMGC,
Design/Build-LS, and
Design/Build-GMP.

▲ 06 - Assumptions
Describe project assumptions, which may include the availability of specific resources, information, funding and collateral projects.

Assumptions *

▲ 07 - Constraints
What limitations or boundaries have been discussed? This might include scope, budget/funding limits, and regulation or desired quality standards.

Constraints *

▲ 08 - High Level Risks
Identify challenges, obstacles, risks or threats that may hinder the project.

High Level Risks *

▲ 09 - Budget
List project budget range, source of funds.

Budget *

▲ 10 - Schedule
Provide schedule range or milestones if possible.

Schedule *

▲ 11 - Contracting Method
Contracting method, project process(es).

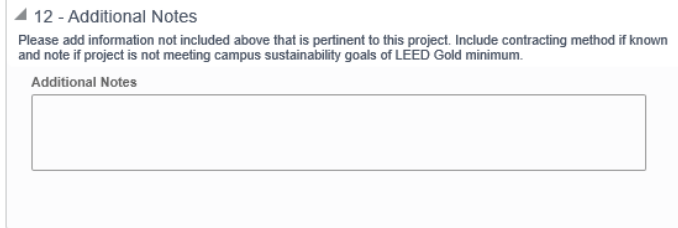
Contracting Method *

Contracting Method Rationale *

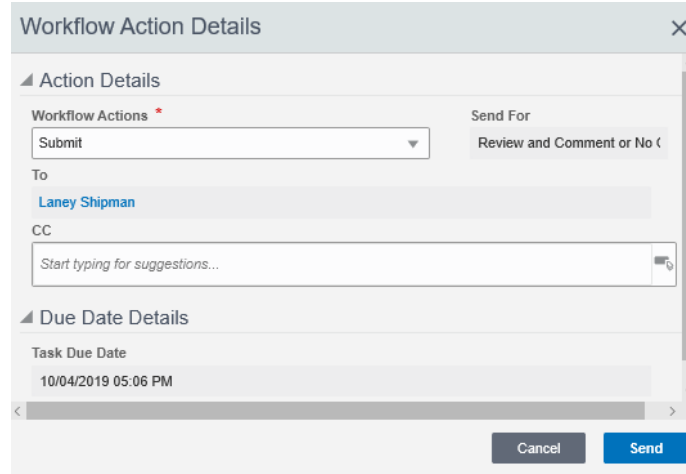
Action By: Project Team

Example

9. In Block 12 – Additional Notes, **add** additional information as needed.



10. Select **Send** in the upper right corner of the form for Workflow Action Details to appear or **Save** to continue working on later.



11. **Review** Workflow Action Details and applicable CC'd users. Select **Send**.

Note: You will notice a task duration of 3 business days.

Note: this review step allows for a period of comments and edits prior to sending for final approvals. It is expected the charter is "correct" prior to send for approvals.

12. The assignee(s) will see the record in Tasks or under Project Charter. Select the record to open.

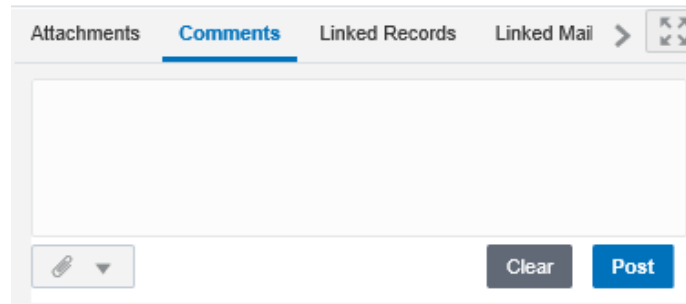
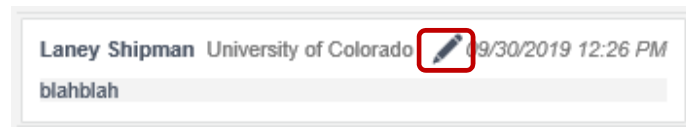
13. This is a review step; all fields are set to read-only.

14. In the upper right-hand corner of the form select **Comments**.

15. Enter comments in the **Comments** box.

- a. Attachments can also be added from pulling-down the contextual menu in the lower left-hand corner.

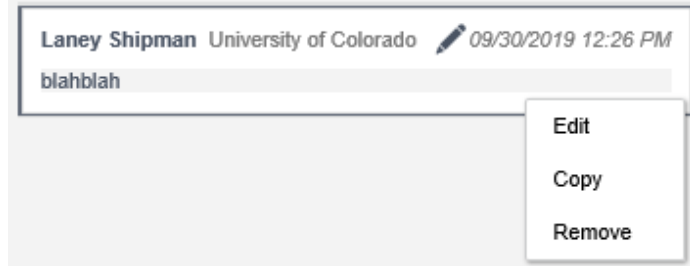
16. **Select** "Post" to add comments.

Action By: Project Team

Example

17. The comment will appear below the **Comments** box. The pencil icon shows that your comment is in draft mode and editable. To edit, copy, or remove a comment select the comment (a dark grey border will appear around the comment) and right-click the pencil icon.. A contextual menu will appear with the options listed above.



Note: When you add a new comment to a business process form, it remains as a draft until you send the form to the next step in the workflow.

Note: Attachments can be added from two options; Browse (from computer) or Document Manager.

Note: The Comments box does not recognize formatting. Even if you use the Enter key to create a new line it will not show up in the final comment.

18. **Send** for Revise Charter or Consensus.
- a. If sent for “Revise Charter”, comments added in previously will be shown in the “Comments” box. The record can be resubmitted or cancelled.
 - b. If resubmitted the record will route back to “Review and Comment” or “No Comment” step. If cancelled the record would be terminated.

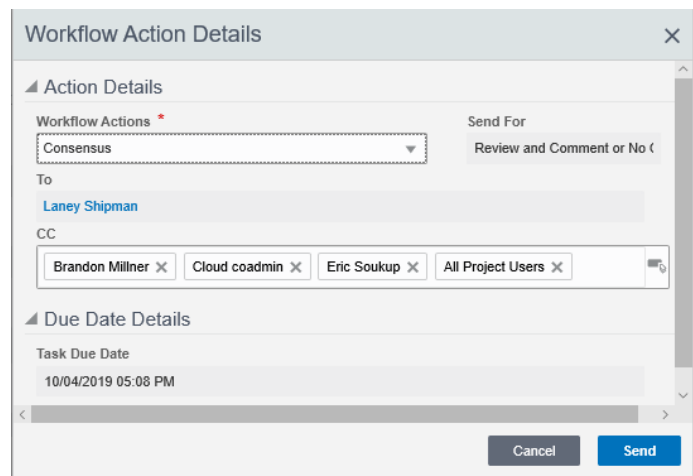
19. **Open** the record in Tasks or under Project Charter.

20. **Review** comments under Comments box and add additional ones if needed.

21. **Repeat** steps above for Review and Comment or No Comment 2

22. **Send** for Consensus.

Note: You will notice a task duration of 3 business days.



Action By: Project Team

23. **Open** the record in Tasks or under Project Charter.
24. **Accept** the task and review the form for pending approval.
25. **Send** for “Approve” and route to the next approval or “Reject w/Comments” and re-route to the first revision step.
26. **Select** “Send”.

Example

The screenshot shows a 'Workflow Action Details' dialog box. Under 'Action Details', the 'Workflow Actions' dropdown is set to 'Consensus'. The 'Send For' field is 'Approval 1'. The 'To' field lists several users: Brandon Millner, Cari Stieglitz, Cloud coadmin, Eric Soukup, Laney Shipman, Laurie Reed, and Assistant... The 'CC' field is empty with a placeholder 'Start typing for suggestions...'. Under 'Due Date Details', the 'Task Due Date' is 10/04/2019 05:10 PM. At the bottom are 'Cancel' and 'Send' buttons.

27. **Open** the record in Tasks or under Project Charter.
28. **Accept** the task and review the form for pending approval.
29. **Send** for “Approve” and route to the next approval.
 - a. Optionally, **send** for “Reject w/Comments” and re-route to the first revision step.
30. **Select** “Send”.

Note: it is generally expected by this step that VCIS and all other applicable reviewers have reviewed and commented until the project charter is sent for this approval and the following approvals.

The screenshot shows a 'Workflow Action Details' dialog box. Under 'Action Details', the 'Workflow Actions' dropdown is set to 'Approve'. The 'Send For' field is 'Approval 2'. The 'To' field lists: Cloud coadmin, Eric Soukup, Laney Shipman, Laurie Reed, and Stakeholders. The 'CC' field is empty with a placeholder 'Start typing for suggestions...'. Under 'Due Date Details', the 'Task Due Date' is 10/04/2019 06:14 PM. At the bottom are 'Cancel' and 'Send' buttons.

Action By: Stakeholders

31. **Accept** the task and **review** the form for pending approval.
32. **Send** for “Approve” and route to the next approval.
 - a. Optionally, **send** for “Reject w/Comments” and re-route to the first revision step.
33. **Select** “Send”.

Example

The screenshot shows a 'Workflow Action Details' dialog box. Under 'Action Details', the 'Workflow Actions' dropdown is set to 'Approve'. The 'Send For' field is 'Approval 3'. The 'To' field lists: Cloud coadmin, Eric Soukup, Laney Shipman, Laurie Reed, and VCIS. The 'CC' field is empty with a placeholder 'Start typing for suggestions...'. Under 'Due Date Details', the 'Task Due Date' is 10/04/2019 06:15 PM. At the bottom are 'Cancel' and 'Send' buttons.

Action By: VCIS

34. **Accept** the task and **review** the form for pending approval.
35. **Send** for “Approve” and route to the next approval.
 - a. Optionally, **send** for “Reject w/Comments” and re-route to the first revision step.
36. Select **Send**.

Example

Action By: Provost/Exec VC, SVC/CFO

37. **Accept** the task and **review** the form for final approval.
38. **Send** for “Approve” and route to end.
 - a. Optionally, **send** for “Reject w/Comments” and re-route to the first revision step.
39. **Select** “Send”.

Example

Note: Approval Date will auto-populate in the View Form once record is sent for final approval.

Approval Date

10/01/2019 11:18 AM (UT)

END TASK

3.2 BUDGET & FUND MANAGEMENT

3.2.0 INTRODUCTION

Budgets are created for the entire lifecycle where funding is the “cash” in the bank. There is no restriction on which is created first but there needs to be enough budget and funding approved in order to issue a consultant or construction contract.

Budget and funding represent the ability to make sure your project has both an approved budget and allocated funding to complete the project. As changes occur, updates to funding need to also occur.

To enable a consistent way of tracking all our cost, budget and funding also begin the cost breakdown structure to which you will manage the remainder of your project. You’ll notice that the costs are more oriented to how we deliver the work and award our contracts. This new structure works in the background to map our projects to our financial and funding tracking, so you don’t have to!

A summary of your budget and funding against your other costs can be found in the cost sheet. Changes are found in Section 3.4 Change Management except for Funding, which maintains the same steps whether it is the first funding or changes to funding.

Please note an important change to how we do business is represented in this system. We are now requiring our clients give us a speed type at the point of an initial request. (Note: For Facilities this will be done at Project Charter).

For projects that start with free consultation speed type that will then be funded by client, you will need to:

1. Send a funding request to Director of Design and Construction to deduct the amount of seed money provided, and
2. Send funding request to the client for the cost of the project including the actual expenses incurred to date under the free consultation

3.2.1 REQUESTING FUNDS FOR NON-CAPITAL PROJECTS (UPDATED: 11/26/2019)

- Goals** How to request funds and allocate them to the cost level.
- Navigation** Project>Budget Funding Management>Funding Requests
- Action By** Project Team
- Pre-requisites** Feasibility Study is approved, and management has directed funding should be assigned to the project.
- Related Files** None.

Action By: Project Team	Example
-------------------------	---------

1. **Navigate** to Project>Budget Funding Management>Funding Requests

Note: Project Type; Capital or Non-Capital, is determined early in the Request Application.

Project workflow will follow the selected project type automatically.

Forms and workflow will guide you through each step and what information is needed.

2. **Select** “Create” to start a new funding request.

- a. Greyed fields will auto-populate when the record is submitted to the workflow.
- b. Red asterisked fields are required.

Funding Requests

+ Create Actions View All Records X C Print

Reco... Current R... Current A... Status

00 - Project Information

Project Number UCB000066	Status
Project Name Budget and Funding Test Project	Creator Laurie Reed
Project Planner Eric Soukup	Creation Date
Project Manager Eric Soukup	Record ID
Project Coordinator Eric Soukup	Project Phase 1 - Feasibility
Primary Contact	BUILDBoulder

BUILD Boulder

Action By: Project Team

Example

3. In 01 – Funding Description **enter** the following information:

- a. A brief description of the funding request. Some Examples: For Feasibility Phase, For Presentation Materials, For work through Construction Documents.
- b. Additional description of funding if needed.

4. Under 02 – Funding Summary, **note** the fields auto-populate when there is approved funding.

- a. Previously Approved Funding: All funding approved prior to current request.
- b. Current Request: Current requested amount.
- c. Projected Approved Funding: The total of previously approved funding and current request.

5. Next, **select** on the “Speed Type Allocation” tab to allocate the request in more detail to the Speed Type.

- a. If the Speed Type is not available, save your record as a draft in Unifier and navigate to the example template at: DC-FIN-FA-UNIFIER SPEED TYPE REQUEST.
- b. Use the attached email template to request the speed type from FM Accounting
- c. When notified that the speed type has been added, finish your Unifier record.

6. **Select** “Add” to start allocating the funding source(s).

Note: Previously allocated funding sources can be found on the project funding sheet at Budget Funding Management>Fund Sheet.

Action By: Project Team

Example

7. **Select** a Funding Source (Speed Type) from the drop-down options.
 - a. You can also type in a number and the options will narrow down to the one you typed.
8. **Enter** the Amount of funding that will be charged to the selected speed type.
9. Optionally, **add** Comments.
10. **Select** “Save” to enter the line item.

Note: Only one Speed Type Allocation (Funding Source) per Funding Request. If your project has more than one Funding Source, you must do a separate Funding Request for each Speed Type.

11. **Select** “Send”.

12. **Note** “Fund” is the only Workflow Action at this step for non-capital projects.

Note: Capital projects have an additional option for Budget Office Funding. Steps are similar and workflow will drive capital-specific requirements.

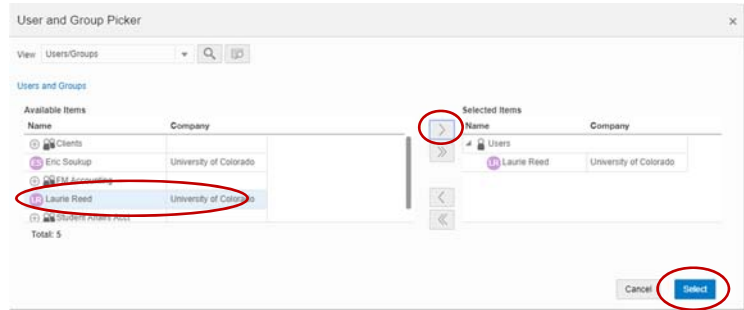
Action By: Project Team

Example

13. A User is selected from the “Available Item” column and brought over to the “Selected Items” column. Highlight the selected user and select the > icon.

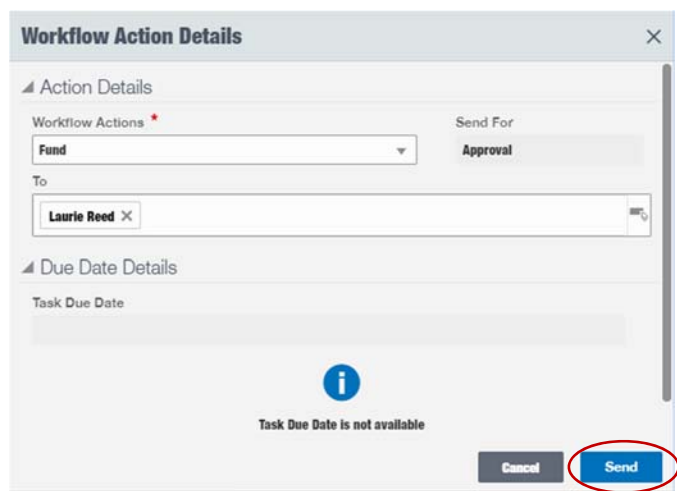
- a. Optionally, you can start typing the name in the box.

Note: Initial consultations/estimates – send to Director of Design and Construction for initial funding.



14. **Select** “Select”

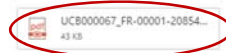
15. **Select** “Send” to open the Workflow Action Details screen.



Action By: Client

Example

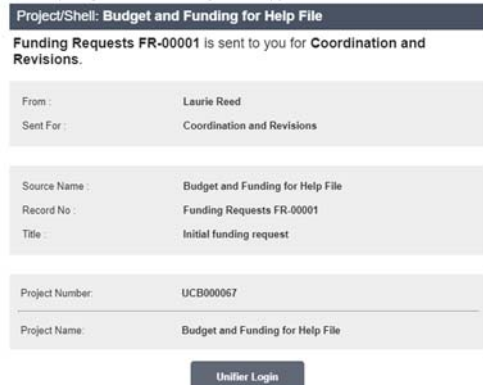
Note: This section is completed by the client.



- 16. An email will be received, including a pdf of the request details.
- 17. **Open** the PDF attachment to review the information provided as part of the funding request.
- 18. **Select** “Approve” if no more changes are needed.

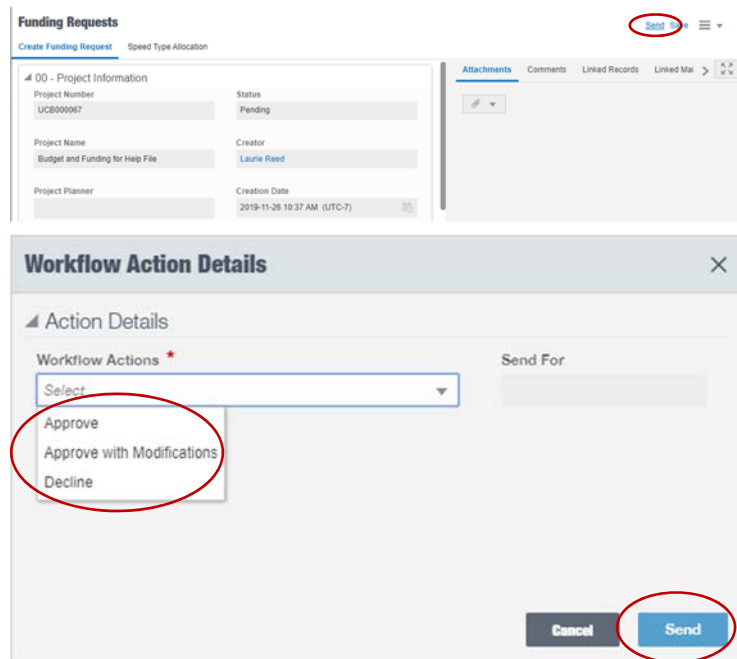
- a. Optionally, **select** “Approve with Modifications” if changes are needed but you don’t need to review again.
- b. Optionally, **select** “Decline” to reject the request and start the process over.

This is a system-generated e-mail message. Do not reply to sender.



19. **Send** the email for the response.
20. To complete the task in Unifier instead of email, **select** on the Unifier Login link and Accept the task.
21. **Review** all details in Unifier.
22. **Select** “Send”.
23. **Select** Workflow Action
24. **Select** “Approve” if no more changes are needed.
25. Optionally, **select** “Approve with Modifications” if changes are needed but you don’t need to review again.
26. Optionally, **select** “Decline” to reject the request and start the process over.

Note: If “Approve with Modifications” or “Decline” is selected, include instructions as to the action requested in Comments.
27. **Select** “Send”.



Action By: Project Team

Example

Note: If modifications are needed, the request is sent to Coordination and Revisions. Coordination and Revisions is notified of the client’s response.

28. **Finds**, opens and accepts the task.
29. **Reviews** Comments tab to see any comments made by the client.
 - a. If changes requested by the Client, update prior to sending.
30. **Select** “Send” to open the Workflow Action Details screen.

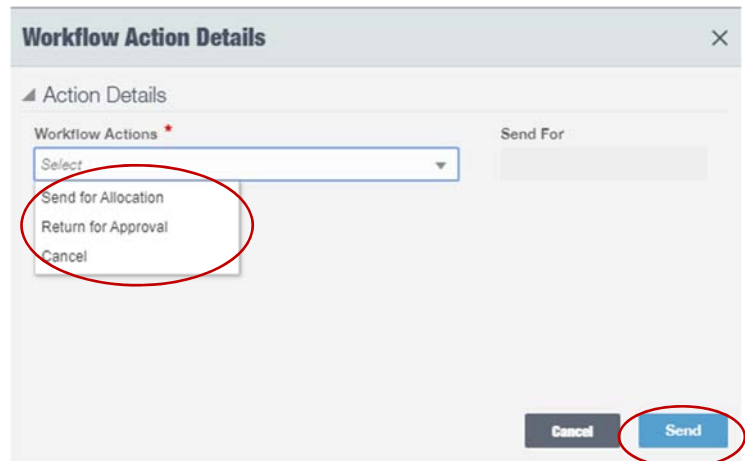
31. **Select** “Send for Allocation” to Send For Cost Code Allocation.
 - a. Optionally, if another round of approval is needed, **select** “Return for Approval” to Send For Approval.
 - b. Optionally, if the client declined the request, **select** “Cancel”, if the Client declined the request, to Send For Cancel: terminal step for the request.
32. **Select** “Send”.

Note: In Capital Funding Requests there are several approval steps necessary before a request may reach the “Send for Allocation” step.

Note: After a funding request is approved by a client and before cost code allocation of that funding, FM Accounting needs to add funding to the company level in Unifier (where project funding across all projects is tracked). In order to accommodate this need, the creator of the funding request will need request that this be done by FM Accounting. See directions in Meridian:

DC-WM-UNI-FUNDING REQUEST-
ADDING FUNDING TO COMPANY
LEVEL.docx

33. When the request is approved and reaches the Cost Code Allocation step, create a Cost Code Allocation record.
34. **Navigate** to Project>Budget Funding Management>Cost Code Allocation.



35. **Select** “Edit” to start updating the Cost Code Allocation.
- a. If this is the first time setting up the Cost Code Allocation (no previous one exists), **select** “Create”.

36. **Confirm** “Active” is the Status in this step.

Note: A Status of “Cancelled” is rarely used and typically performed by the Project Admin for a special instance.

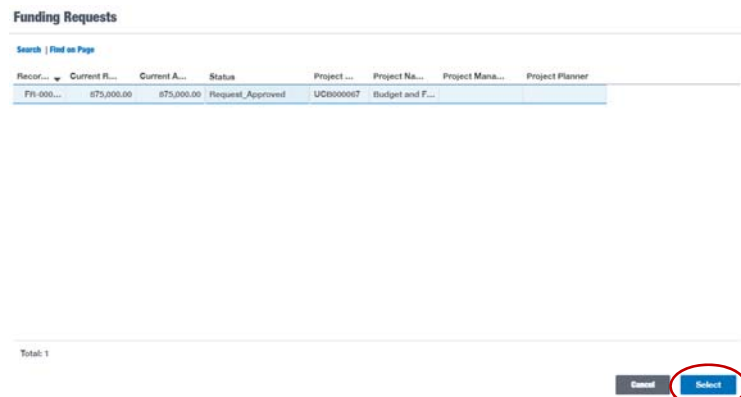
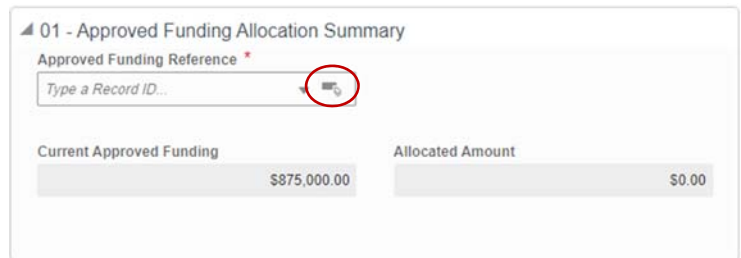
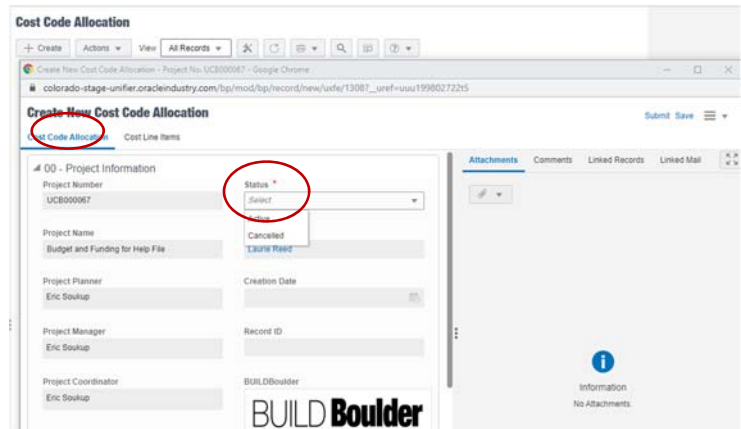
37. Greyed fields will be auto populated.

38. **Locate** the Funding Request by opening the picker box or typing the Record ID.

39. **Note** “Current Approved Funding” auto-populates.

40. **Highlight** the Funding Request then double select on the Funding Request to select.

Note that this should be changed if a more recent funding request has been issued since the last Cost Code Allocation. If there have been no updates and the just the allocation is changing, this can remain the same.



NOTE: Special consideration when processing multiple Funding Requests that reach the Cost Code Allocation step at the same time:

System will validate that the allocated amount equals the current approved funding, which will include multiple requests in this scenario; allocation only needs to be completed once; Example:

FR-00002 is submitted and approved for \$3,000 reaching the Cost Code Allocation step

FR-00003 is submitted and approved for \$5,000 as well before the user can complete the Cost Code Allocation step for FR-00002

User creates the Cost Code Allocation record and allocates \$8,000 referencing the most recent Funding Request (although system validates against full current funding amount regardless of which record is selected)

User completes Cost Code Allocation step for both FR-00002 and FR-00003

If a user needs to reallocate Funding (no increase/decrease to funding), they may do so without a Funding Request but will be restricted to the current approved funding amount and will not be able to reduce funding amounts below committed amounts for cost codes with commits

Record	Current A.	Status	Project	Project No.	Project Manager	Budget Planner
FR-00003	5,000.00	Request Approved	DC000007	Budget and Fa...	Eric Seakop	Eric Seakop
FR-00002	3,000.00	Request Approved	DC000007	Budget and Fa...	Eric Seakop	Eric Seakop

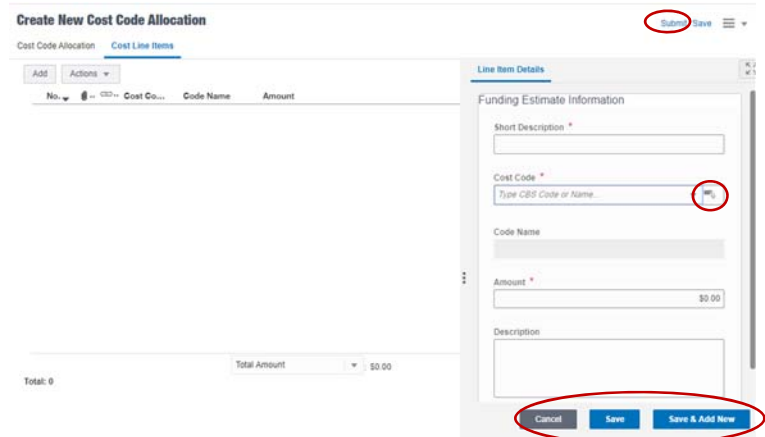
Total: 2

Cancel Submit

41. **Open** Cost Line Items”

42. **Select** “Add”

- a. Red asterisked fields are required.



43. **Select** a Cost Code by typing the CBS Code or Name, or by selecting from the CBS Picker.

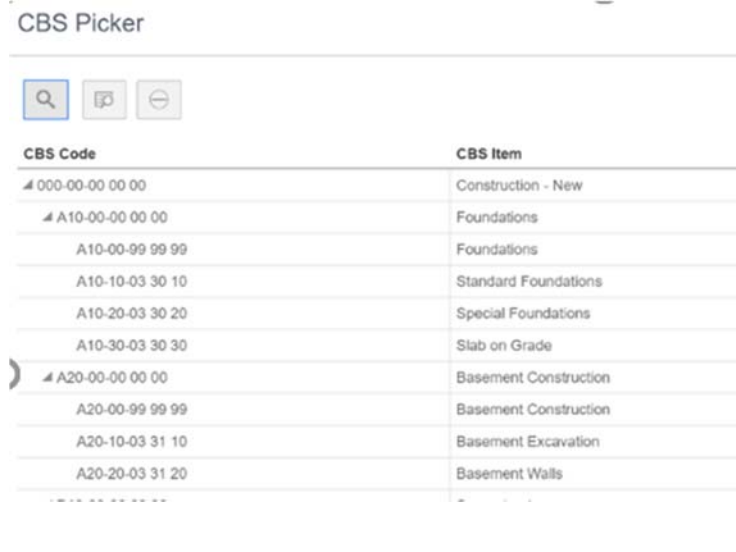
44. **Select** “Save” to save the current entry.

45. **Select** “Save & Add New” to save the current entry and add another Cost Line Item.

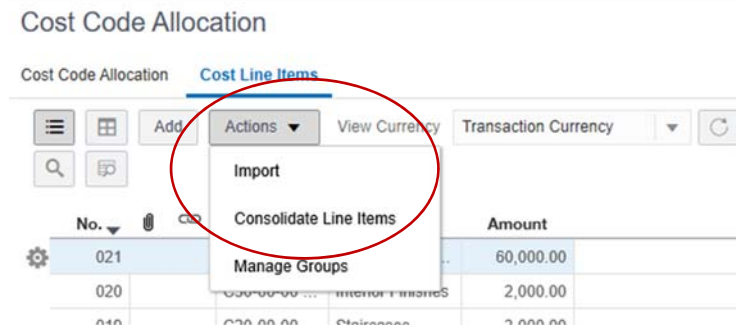
46. **Select** “Cancel” to cancel the current entry.

47. **Select** “Submit”.

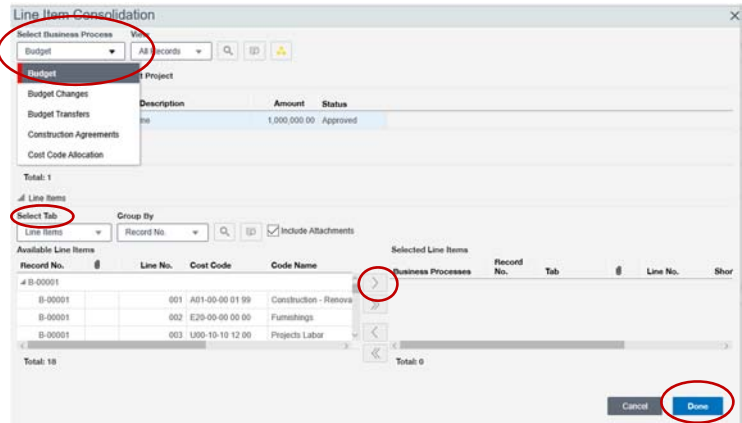
Note: Cost allocations cannot exceed current approved funding.



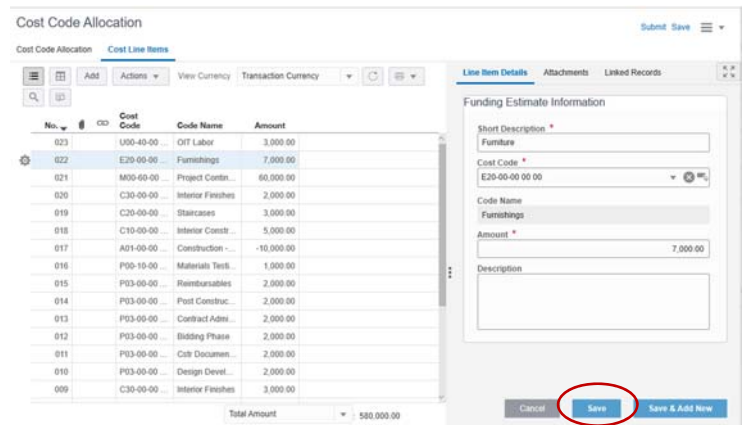
48. Optionally, **select** “Consolidate Line Items: from the Actions drop-down menu.



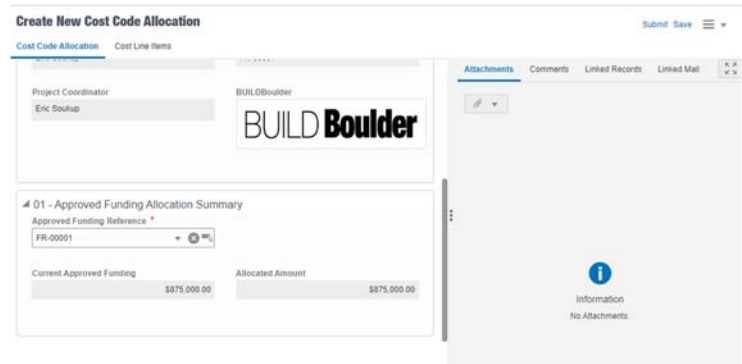
49. A new window opens.
50. **Select** the Business Process from the drop-down menu
51. **Select** “Line Items” from the “Select Tab”
52. **Highlight** the desired line and select the > symbol
53. **Note:** Multiple lines may be chosen by using your Ctrl key and highlighting all the rows you want to bring over.
54. **Select** “Done”



55. Cost Line Items added via consolidation, plus all previously allocated Cost Codes, are now visible.
56. **Edit** the Cost Line Items so that “Total Amount” equals “Current Approved Funding” in the “Cost Code Allocation” tab.
57. **Select** “Save” after each edit is made.



58. Allocated Amount is populated.
59. **Select** “Submit”. There is no workflow to Cost Code Allocation. The allocation is complete when submitted.



- 60. **Return** to the funding request by navigating to Project>Budget & Funding Management>Funding Request)
- 61. There is now a required response to “Have you allocated the approved funding amount?”
Note: Do not proceed if you have not yet allocated the funds in “Cost Code Allocation”.

Funding Requests
Allocation of Funding Speed Type Allocation

02 - Funding Summary

Have you allocated the approved funding amount?
Select

Allocated Amount: \$0.00 Current Approved Funding: \$0.00

- 62. **Select** “Yes” if Cost Code Allocation is complete.
- 63. Note that “Allocated Amount” and “Current Approved Funding” are now populated. (values should match)
- 64. **Select** “Send”.

Funding Requests Send

Allocation of Funding Speed Type Allocation

02 - Funding Summary

Have you allocated the approved funding amount?
Yes

Allocated Amount: \$875,000.00 Current Approved Funding: \$875,000.00

- 65. In the Workflow Actions detail screen, **select** “Allocate” to finalize the funding request. This is a terminal step.
 - a. Selecting “Cancel” negates the funding request and is also a terminal step.
- 66. **Select** “Send”.
Note: FM Accounting is copied.

Workflow Action Details

Action Details

Workflow Actions * Send For

Select

Allocate

Cancel

Cancel Send

END TASK

3.2.2 REQUESTING FUNDS FOR CAPITAL PROJECTS (UPDATED: 11/26/2019)

- Goals** How to request funds and allocate them to the cost level.
- Navigation** Project>Budget Funding Management>Funding Requests
- Action By** Project Team
- Pre-requisites** Feasibility Study is approved, and management has directed funding should be assigned to the project. NOTE: There is one funding request per one speedtype. If multiple speedtypes, repeat for each.
- Related Files** 3.2.1 Requesting Funds for Non-Capital Projects

Action By: Project Team **Example**

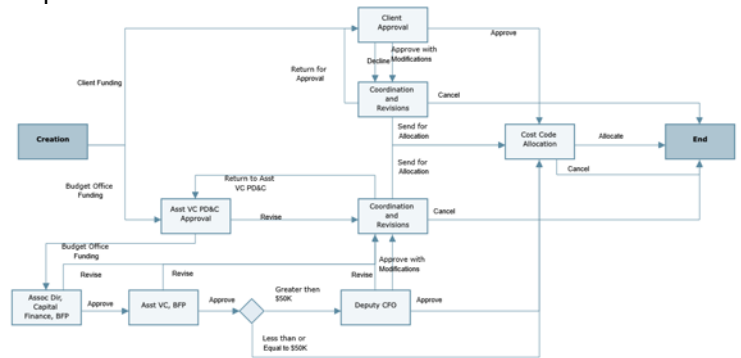
- Navigate** to Project>Budget Funding Management>Funding Requests

Note: Project Type; Capital or Non-Capital, is determined in the Request Application.

Project workflow will follow the selected project type automatically.

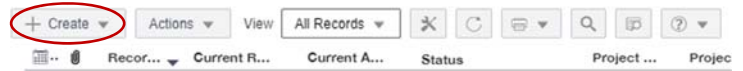
Forms and workflow will guide you through each step and what information is needed.

Capital Workflow



- Select** "Create".

Funding Requests



- Note** that greyed fields will auto-populate when the record is submitted to the workflow and red asterisked fields are required.

00 - Project Information

Project No.	Status
<input type="text"/>	<input type="text"/>
Project Name	Creator
<input type="text"/>	Carl Stieglitz
Project Planner	Creation Date
Eric Soukup	<input type="text"/>
Project Manager	Record ID
Eric Soukup	<input type="text"/>
Project Coordinator	Project Phase
Eric Soukup	<input type="text"/>
Primary Contact	BUILDBoulder
Eric Soukup	<input type="text"/>

Action By: Project Team

Example

4. In 01 – Funding Information **enter** the following information:
 - a. Brief Description: To show in reporting.
 - b. Description: Enter description of the funding request.

5. **Note** the fields auto-populate when there is approved funding.
 - a. Previously Approved Funding: All funding approved prior to current request.
 - b. Current Request: Current requested amount.
 - c. Projected Approved Funding: The total of previously approved funding and current request.

6. Next, **select** on the “Speed Type Allocation” tab to allocate the request in more detail to the Speed Type.
 - a. If the Speed Type is not available, save your record as a draft in Unifier and navigate to the example template at: DC-FIN-FA-UNIFIER SPEED TYPE REQUEST.
 - b. Use the attached email template to request the speed type from FM Accounting

7. **Wait** to be notified that the speed type has been added, then log back into Unifier to finish your Unifier record.

8. **Select** “Add” to start allocating the funding source(s). Previously allocated funding sources can be found on the project funding sheet.

The screenshot shows two sections of a web form. The first section, '01 - Funding Information', contains two text input fields: 'Brief Description *' and 'Description'. The second section, '02 - Funding Summary', displays three summary items with their respective values: 'Previously Approved Funding' (0.00), 'Current Request' (0.00), and 'Projected Approved Funding' (0.00).

The screenshot shows the 'Create New Funding Requests' interface. At the top, there are tabs for 'Create Funding Request' and 'Speed Type Allocation', with the latter being the active tab. Below the tabs is a table with columns for 'No.', 'Funding Source (Speed Type)', and 'Fund Name'. An 'Add' button is circled in red. A 'Live Item Details' modal is open on the right, showing a form for 'Funding Information' with fields for 'Funding Source (Speed Type)', 'Fund Name', 'Amount *' (set to 0.00), and 'Comments'. At the bottom of the modal are 'Cancel', 'Save', and 'Save & Add New' buttons.

Action By: Project Team

Example

9. **Select** a Funding Source (Speed Type) from the drop-down options. You can also type in a number and the options will narrow down to the one you typed.
10. **Enter** the Amount of funding that will be charged to the selected speed type.
 - a. Optionally, **add** Comments if, for example, may note other funding sources and amounts.
11. **Select** “Save” to enter the line item.

Funding Information
Funding Source (Speed Type) *
Type a Funding Source (Speed Type) ...

Fund Name

Amount *
0.00

Comments

Cancel Save Save & Add New

Note: Only one Speed Type Allocation (Funding Source) per Funding Request. If your project has more than one Funding Source, you must do a separate Funding Request for each Speed Type.

12. **Select** “Send” to open the Workflow Action Details screen.

Create New Funding Requests
Send Save

Create Funding Request Spend Type Allocation

Add Actions

No.	Short Description	Funden...	Fund Name	Amount
Total: 0				

Line Item Details

Funding Information
Funding Source (Speed Type) *
Type a Funding Source (Speed Type) ...

Fund Name

Amount *
0.00

Comments

Total: 0

13. **Select** “Budget Office Funding”.
 - a. Optionally, select “Client Funding” and workflow will route to client and other approvers in following steps.
14. “To” field is auto populated to send for Asst. VC PD & C for approval
15. **Select** “Send”

Workflow Action Details

Action Details

Workflow Actions *
Budget Office Funding

Send For
Asst VC PD&C Approval

To
AriAnne Gilliland;Eric Soukup;Asst VC PD&C

Due Date Details

Task Due Date

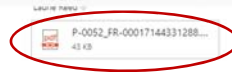
Cancel Send

Action By: Project Team

Example

16. The request will be in the Asst. VC PD & C inbox, including a pdf of the request details. Asst. VC PD & C reviews pdf details.
17. The Asst. VC PD & C may approve via email by selecting one of the two options at the bottom, a reply email will be initiated. Asst. VC PD & C will indicate in their email any comment regarding their approval or requested modifications. The email response will be saved in the record's General Comments
 - a. Selecting "Budget Office Funding" sends the request for Assoc Dir, Capital Finance, BFP
 - b. Selecting "Revise" sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
 - c. Coordination and Revisions will Cancel the request if instructed to do so by the Asst. VC PD & C. This is a terminal step for the request.
18. The Asst. VC PD & C may decide to log in to Unifier by selecting Unifier Login. The request task opens.
19. Asst. VC PD & C Accepts the task

Funding Requests FR-00017 is sent to you for Asst VC PD&C Approval : NID D431C7D2-F946-7578-321D-148A9CC737D9



This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: UAT Testing Iteration 3

Funding Requests FR-00017 is sent to you for Asst VC PD&C Approval.

From : Laurie Reed
Sent For : Asst VC PD&C Approval

Source Name : UAT Testing Iteration 3
Record No : Funding Requests FR-00017
Title : test 05 Capital

Project No : P-0052

Project Name : UAT Testing Iteration 3

Additional Information : When replying to this e-mail do NOT modify the Subject line in any way, including adding or deleting any text.

Option 1: Log into Unifier and take a workflow action.



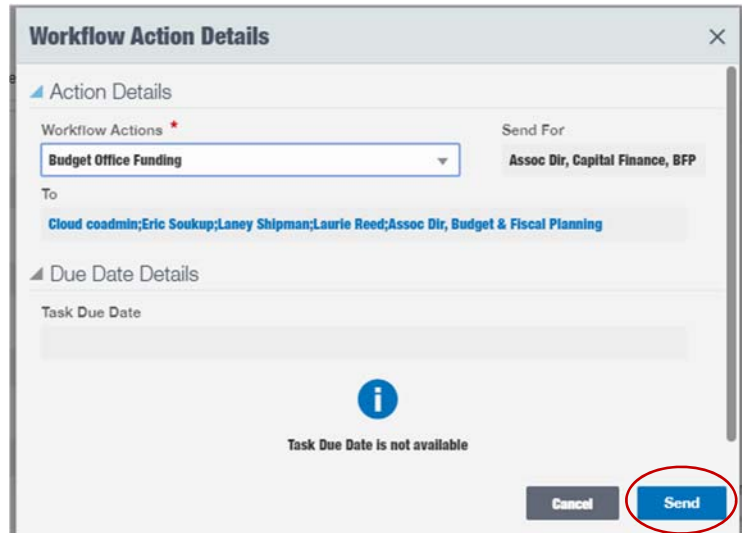
Option 2: Click on one of the following links to take a workflow action and respond by email. Task will be responded with the action to record in General Comments.



Action By: Project Team

Example

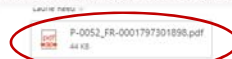
20. **Review** all details in Unifier.
 - a. Selecting “Budget Office Funding” sends the request for Assoc Dir, Capital Finance, BFP
 - b. Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
 - c. Coordination and Revisions will Cancel the request if instructed to do so by the Asst. VC PD & C. This is a terminal step for the request.



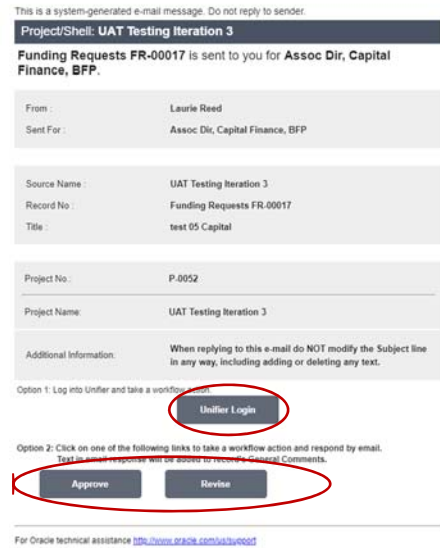
21. **Select** “Send”.

22. The request will be in the Assoc Dir, Capital Finance, BFP inbox, including a pdf of the request details. Assoc Dir, Capital Finance, BFP reviews pdf details.

Funding Requests FR-00017 is sent to you for Assoc Dir, Capital Finance, BFP : NID 538BD758-BB70-33B7-E334-E9321559308E



23. The Assoc Dir, Capital Finance, BFP may approve via email by selecting one of the two options at the bottom, a reply email will be initiated. Asst. VC PD & C will indicate in their email any comment regarding their approval or requested modifications. The email response will be saved in the record’s General Comments



- a. Selecting “Approve” sends the request for Asst VC, BFP
- b. Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
- c. Coordination and Revisions will Cancel the request if instructed to do so by the Assoc Dir, Capital Finance, BFP. This is a terminal step for the request.

24. The Assoc Dir, Capital Finance, BFP may decide to log in to Unifier by selecting Unifier Login. The request task opens.

Action By: Project Team

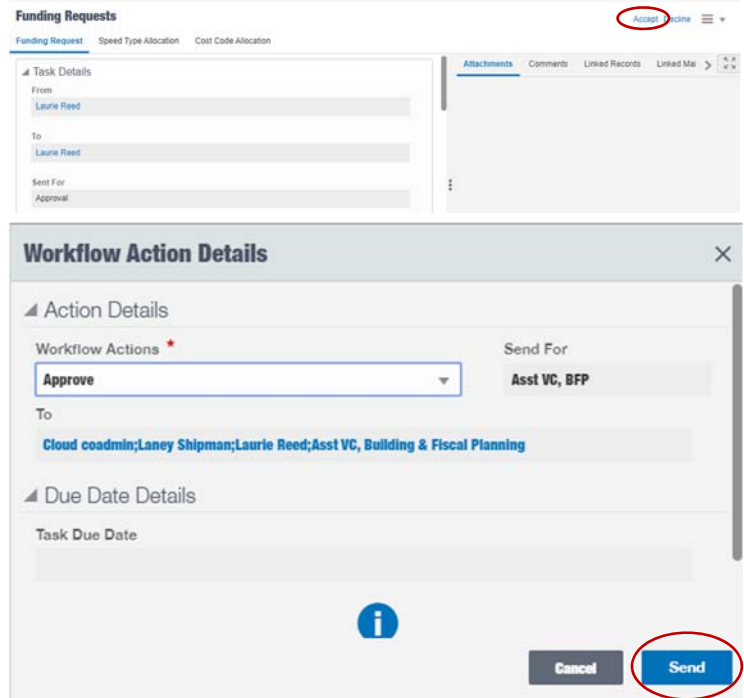
Example

25. Assoc Dir, Capital Finance, BFP **accepts** the task

26. **Review** all details in Unifier.

- a. Selecting “Approve” sends the request for Asst VC, BFP
- b. Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
- c. Coordination and Revisions will Cancel the request if instructed to do so by the Assoc Dir, Capital Finance, BFP. This is a terminal step for the request.

27. **Select** “Send”.



Action By: Project Team

Example

28. The request will be in the Asst VC, BFP inbox, including a pdf of the request details. Asst VC, BFP reviews pdf details.
29. The Asst VC, BFP may approve via email by selecting one of the two options at the bottom, a reply email will be initiated. Asst. VC PD & C will indicate in their email any comment regarding their approval or requested modifications. The email response will be saved in the record's General Comments
 - a. Selecting "Approve" sends the request for Deputy CFO, if the request is greater than \$50K. If the request is less than or equal to \$50K, the request will be sent for Cost Code Allocation.
 - b. Selecting "Revise" sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
 - c. Coordination and Revisions will Cancel the request if instructed to do so by the Asst VC, BFP. This is a terminal step for the request.
30. The Asst VC, BFP may decide to log in to Unifier by selecting Unifier Login. The request task opens.
31. Asst VC, BFP Accepts the task

Funding Requests FR-00017 is sent to you for Asst VC, BFP : NID 156C346F-DF17-7A6B-D8A2-54CCE21DE55C



This is a system-generated e-mail message. Do not reply to sender.

Project/Shell: UAT Testing Iteration 3

Funding Requests FR-00017 is sent to you for Asst VC, BFP.

From : Laurie Reed
Sent For : Asst VC, BFP

Source Name : UAT Testing Iteration 3
Record No : Funding Requests FR-00017
Title : test 05 Capital

Project No : P-0052
Project Name : UAT Testing Iteration 3

Additional Information : When replying to this e-mail do NOT modify the Subject line in any way, including adding or deleting any text.

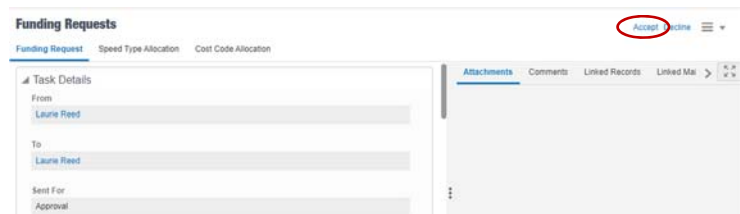
Option 1: Log into Unifier and take a workflow action



Option 2: Click on one of the following links to take a workflow action and respond by email. Task status responses will be stored in the record's General Comments.



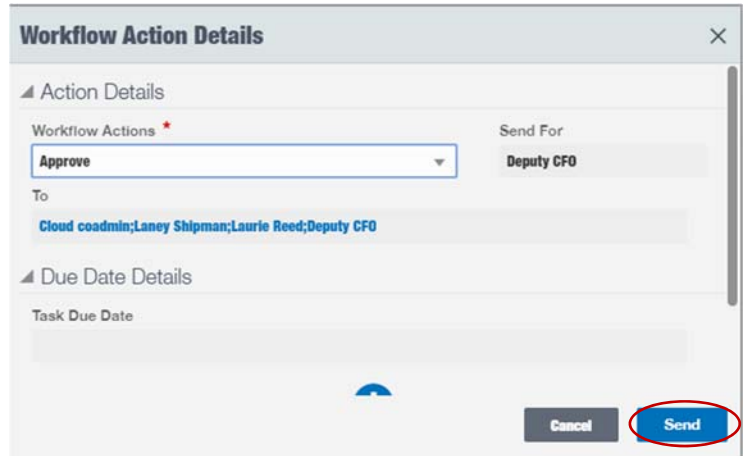
For Oracle technical assistance <http://www.oracle.com/us/support>



Action By: Project Team

Example

32. **Review** all details in Unifier.
- Selecting “Approve” sends the request for Deputy CFO, if the request is greater than \$50K. If the request is less than or equal to \$50K, the request will be sent for Cost Code Allocation.
 - Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
 - Coordination and Revisions will Cancel the request if instructed to do so by the Asst VC, BFP. This is a terminal step for the request.



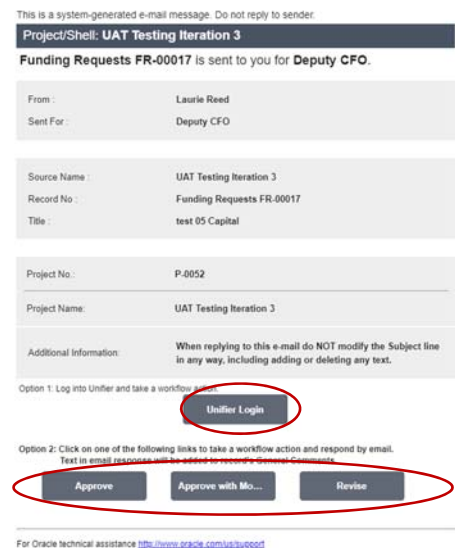
33. **Select** “Send”.

34. The request will be in the Deputy CFO inbox, including a pdf of the request details. Deputy CFO reviews pdf details.



35. The Deputy CFO may approve via email by selecting one of the three options at the bottom, a reply email will be initiated. Deputy CFO will indicate in their email any comment regarding their approval or requested modifications. The email response will be saved in the record’s General Comments

- Selecting “Approve” sends the request for Cost Code Allocation.
- Selecting “Approve with Modifications” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C. Asst. VC PD & C will approve if the requested modifications were made correctly.

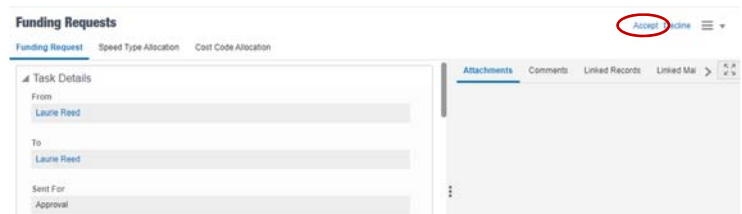


Action By: Project Team

Example

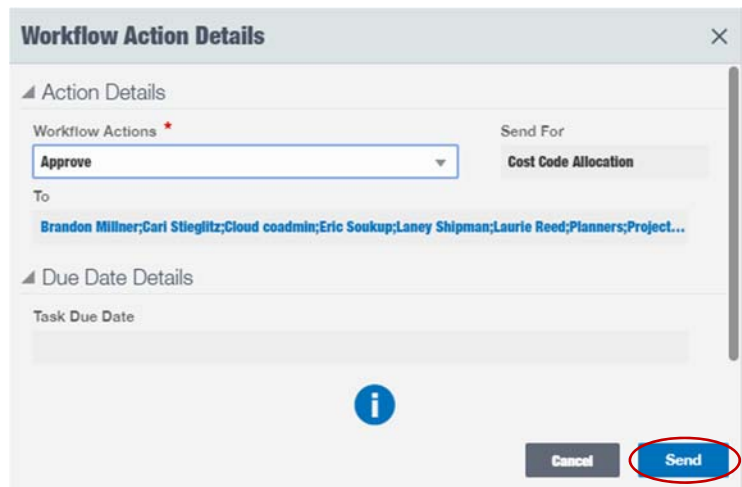
- c. Coordination and Revisions will Cancel the request if instructed to do so by the Deputy CFO. This is a terminal step for the request.
 - d. Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.
36. The Deputy CFO may decide to log in to Unifier by selecting Unifier Login. The request task opens.

37. Deputy CFO **Accepts** the task



38. **Review** all details in Unifier.

- a. Selecting “Approve” sends the request for Cost Code Allocation.
- b. Selecting “Approve with Modifications” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C. Asst. VC PD & C will approve if the requested modifications were made correctly.
- c. Coordination and Revisions will Cancel the request if instructed to do so by the Deputy CFO. This is a terminal step for the request.
- d. Selecting “Revise” sends the request for Coordination and Revisions to make requested revisions and resubmit to Asst. VC PD & C.



39. **Select** “Send”.

Action By: Project Team

Example

Note: In Capital Funding Requests there are several approval steps necessary before a request may reach the “Send for Allocation” step.

Note: After a funding request is approved and before cost code allocation of that funding, FM Accounting needs to add funding to the company level in Unifier (where project funding across all projects is tracked). In order to accommodate this need, the creator of the funding request will need request that this be done by FM Accounting.

See directions in Meridian at: DC-WM-UNI-FUNDING REQUEST-ADDING FUNDING TO COMPANY LEVEL.docx

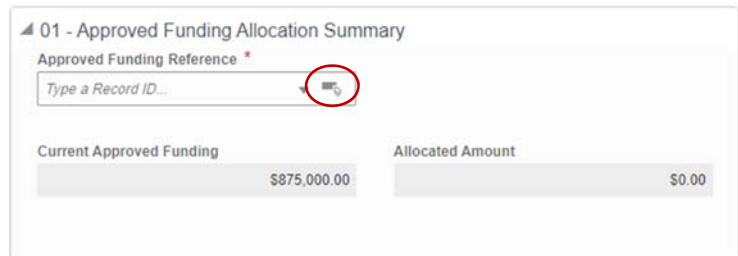
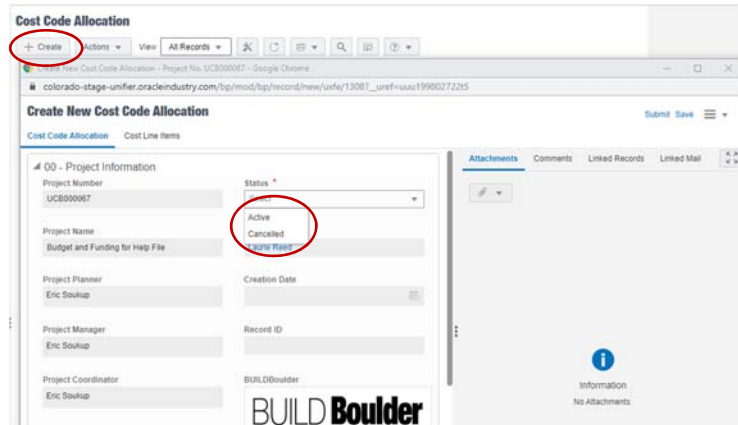
40. When the request is approved and reaches the Cost Code Allocation step, create a Cost Code Allocation record.
41. **Navigate** to Project>Budget Funding Management>Cost Code Allocation
42. **Open** existing Cost Code Allocation and **select** “Edit”.
43. **Confirm** “Active” is the Status in this step.

Note: A Status of “Cancelled” is rarely used and typically performed by the Project Admin for a special instance.

44. Greyed fields will be auto populated.

Note: “Create” is only used for the first Funding Request. Cost Code Allocations for following Funding Requests are performed by accessing and opening the existing record.

45. **Locate** the Funding Request by opening the picker box or typing the Record ID.
 - a. Current Approved Funding auto-populates.



Action By: Project Team

Example

46. **Highlight** the Funding Request then “Select”, or double select on the Funding Request.

Funding Requests

Search | Find on Page

Record	Current R...	Current A...	Status	Project ...	Project Na...	Project Mana...	Project Planner
FR-000...	875,000.00	875,000.00	Request Approved	UCB000067	Budget and F...		

Total: 1

Cancel **Select**

NOTE: Special consideration when processing multiple Funding Requests that reach the Cost Code Allocation step at the same time:

System will validate that the allocated amount equals the current approved funding, which will include multiple requests in this scenario; allocation only needs to be completed once; Example:

FR-00002 is submitted and approved for \$3,000 reaching the Cost Code Allocation step

FR-00003 is submitted and approved for \$5,000 as well before the user can complete the Cost Code Allocation step for FR-00002

User creates the Cost Code Allocation record and allocates \$8,000 referencing the most recent Funding Request (although system validates against full current funding amount regardless of which record is selected)

User completes Cost Code Allocation step for both FR-00002 and FR-00003

If a user needs to reallocate Funding (no increase/decrease to funding), they may do so without a Funding Request but will be restricted to the current approved funding amount and will not be able to reduce funding amounts below committed amounts for cost codes with commits

Funding Requests

Search | Find on Page

Record	Current R...	Current A...	Status	Project ...	Project Na...	Project Mana...	Project Planner
FR-00003	5,000.00	880,000.00	Request Approved	UCB000067	Budget and Fe...	Eric Seakop	Eric Seakop
FR-00002	3,000.00	878,000.00	Request Approved	UCB000067	Budget and Fe...	Eric Seakop	Eric Seakop

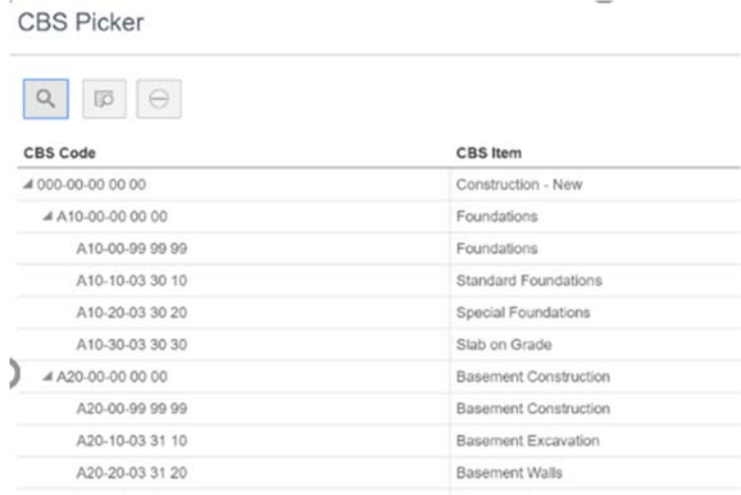
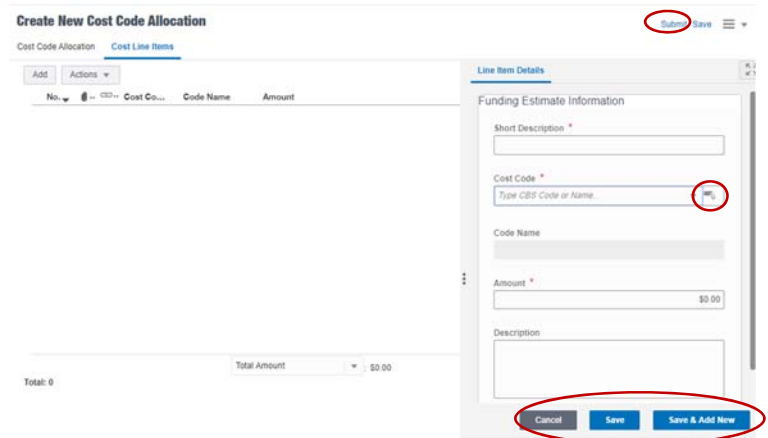
Total: 2

Cancel **Select**

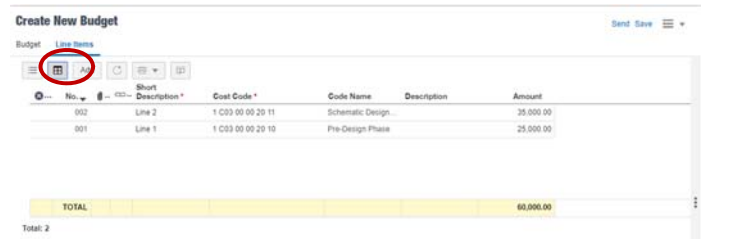
Action By: Project Team

Example

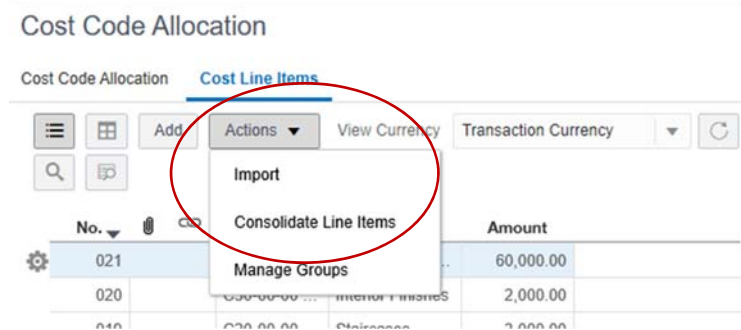
47. **Open** “Cost Line Items” and **select** “Add”.
 - a. Note red asterisked fields are required.
 48. **Select** a Cost Code by typing the CBS Code or Name, or by selecting from the CBS Picker.
 49. **Select** “Save” to save the current entry.
 50. **Select** “Save & Add New” to save the current entry and add another Cost Line Item.
 51. **Select** “Cancel” to cancel the current entry.
 52. **Select** “Submit”.
- Note: Cost allocations cannot exceed current approved funding.



53. Using the Grid View is a quick method for updating existing line items.



54. Optionally, **select** “Consolidate Line Items”: from the Actions drop-down menu.
 - a. A new window opens.



Action By: Project Team

Example

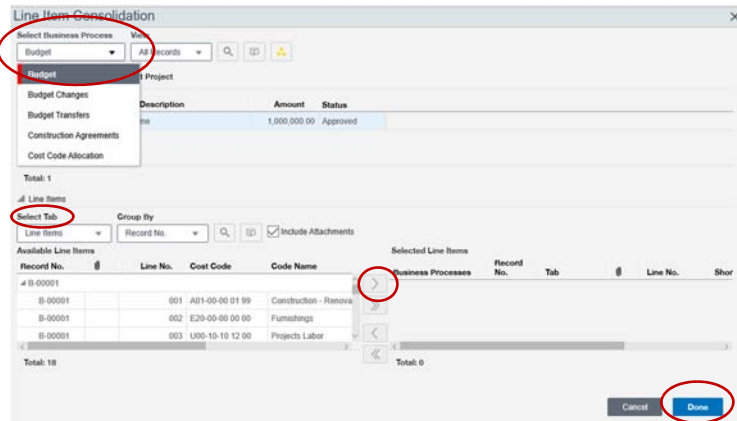
55. **Select** the Business Process from the drop-down menu

56. **Select** “Line Items” from the “Select Tab”

57. **Highlight** the desired line and select the > symbol

Note: Multiple lines may be chosen by using your Ctrl key and highlighting all the rows you want to bring over.

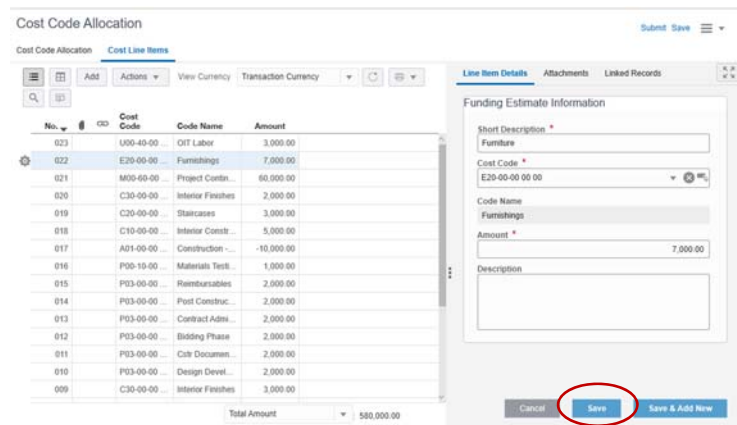
58. **Select** “Done”



59. **Note** Cost Line Items added via consolidation, plus all previously allocated Cost Codes, are now visible.

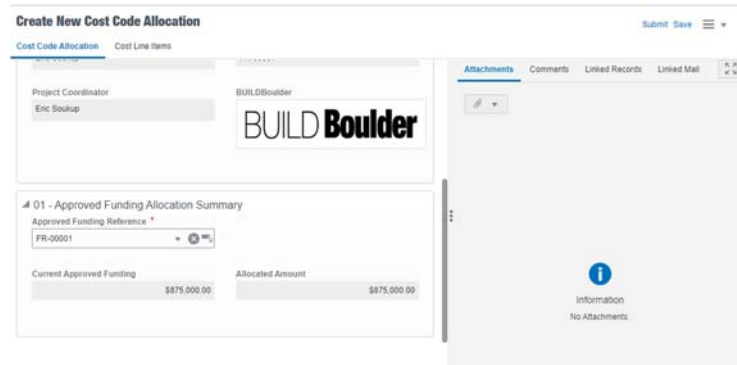
60. **Edit** the Cost Line Items so that “Total Amount” equals “Current Approved Funding” in the “Cost Code Allocation” tab.

61. **Select** “Save” after each edit is made.



62. **Note** “Allocated Amount” is populated.

63. **Select** “Submit”. There is no workflow to Cost Code Allocation. The allocation is complete when submitted.



Action By: Project Team

Example

- 64. **Return** to, open and Accept the Funding Request.
- 65. There is now a required response to “Have you allocated the approved funding amount?”

Note: Do not proceed if you have not yet allocated the funds in “Cost Code Allocation”.

Funding Requests
Allocation of Funding Speed Type Allocation

02 - Funding Summary

Have you allocated the approved funding amount?
Select

Allocated Amount: \$0.00 Current Approved Funding: \$0.00

- 66. **Select** “Yes” if Cost Code Allocation is complete.
- 67. **Note** “Allocated Amount” and “Current Approved Funding” are now populated and numbers should match.
- 68. **Select** “Send” to open the Workflow Action Details screen.

Funding Requests Send

Allocation of Funding Speed Type Allocation

02 - Funding Summary

Have you allocated the approved funding amount?
Yes

Allocated Amount: \$875,000.00 Current Approved Funding: \$875,000.00

- 69. **Select** “Allocate” to finalize the funding request. This is a terminal step.
 - a. Optionally, select “Cancel” to negate the funding request and restart the process (it is a terminal step).
- 70. **Select** “Send”.

Workflow Action Details

Action Details

Workflow Actions *
Select

Allocate
Cancel

Send For

Cancel Send

END TASK

3.2.3 CREATING AND MANAGING A BUDGET (UPDATED: 03/11/2020)

- Goals** How to create and update a budget.
- Navigation** Project>Budget Funding Management>Budget
- Action By** Project Team
- Pre-requisites** Approved Funding
- Related Files** 3.2.1 Requesting Funds for Non-Capital Projects
3.2.2 Requesting Funds for Capital Projects

Action By: Project Team

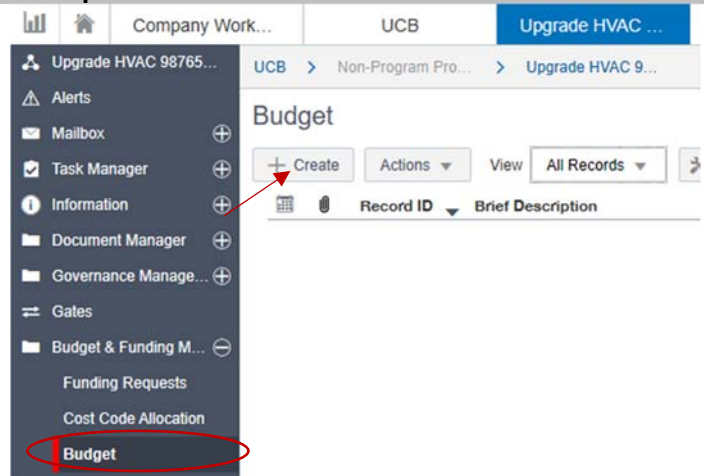
- Navigate** to Project>Budget Funding Management>Budget.

Note that budget prior to schematic design is considered a working budget. The budget can be formally baselined at Schematic Design approval.

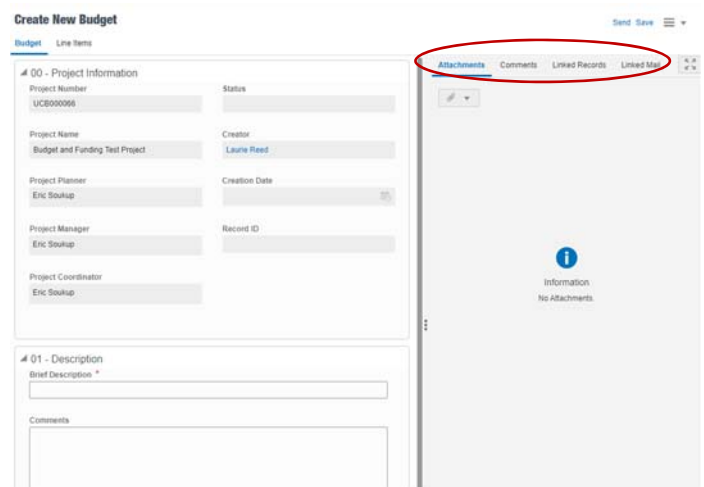
Note: If a working budget exists, a new budget cannot be created. If an update is needed (prior to baseline budget), the change is made in the existing record.

Note: Leave the budget in “Hold for Updates” Don’t accept the task until you are going to do an update.

Example



- Select** Create and note:
 - Project Information fields auto-populate.
 - Red asterisked fields are required.
- Enter** “Brief Description” to identify type of budget, for example: Working Project Budget, Concept Phase Budget, Schematic Design Budget – Baseline, etc.
- Add** any Attachments, Comments or Linked Records.



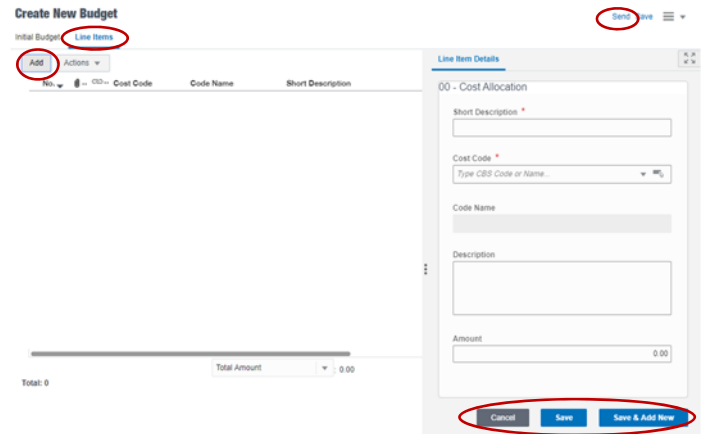
Action By: Project Team

Example

5. **Select** “Line Items” tab
6. **Select** “Add” to open Line Item Details.
7. Begin adding line items to your budget.

Note: Short Description can be same text as cost code name or can be more specific.

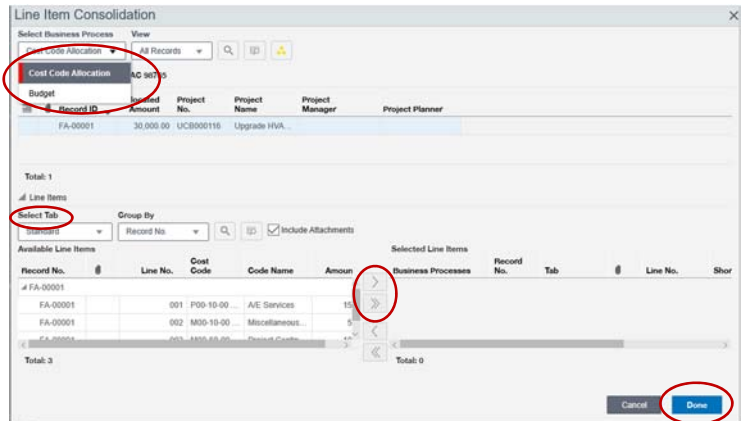
 - a. Red asterisked fields are required.
8. **Select** “Cancel” to cancel current entry, “Save” to save current entry, or “Save & Add” New to save current entry and add another.
9. Optionally, **import** your line items from a funding request you have previously created.
10. **Select** “Actions>Consolidate Line Items”.



11. A new window opens.
12. **Select** the Business Process from the drop-down menu. In this case it will be Cost Code Allocation which was completed as part of the funding steps.
13. **Select** “Standard” from the “Select Tab”
14. **Highlight** the desired line and select the > symbol

Note: Selecting >> will bring over all lines.

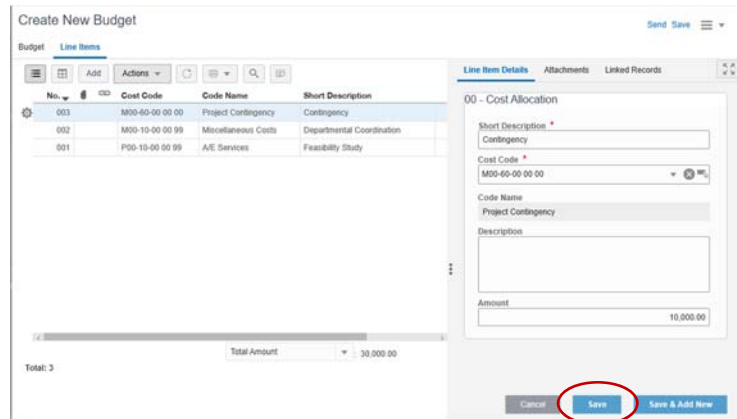
Note: Multiple lines may be chosen by using your Ctrl key and highlighting all the rows you want to bring over.
15. **Select** “Done”



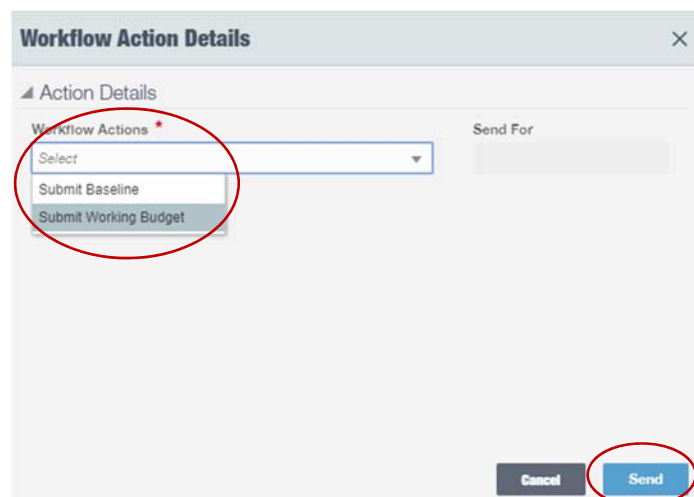
Action By: Project Team

Example

16. Cost Line Items added via consolidation are now visible.
17. **Edit** the Cost Line Items if needed.
18. **Select** “Save” after each edit is made.



19. **Select** Submit Working Budget sends the budget for Hold for Updates. This step is for any budget prior to baseline at SD approval.
20. **Select** Submit Working Budget if the budget will change prior to submitting the baseline budget. This can be done as often as needed, prior to establishing the baseline budget.
21. **Select** Submit Baseline sets the baseline budget. This option is only available at a project level (not program level or feasibility). This is a terminal step for the Initial Budget. If further changes are needed See “Budget Change” and “Budget Transfer”.
22. **Select** “Send”.
23. **Wait** until the Budget is ready for baseline. (See 3.2.4 Baselining the Budget)



END TASK

3.2.4 BASELINING THE BUDGET (UPDATED: 02/18/2020)

Goals How to baseline a budget and begin using Budget Transfers and Budget changes.

Navigation Project>Budget Funding Management>Budget

Action By Project Team

Pre-requisites Budget is created and design is approved as final.

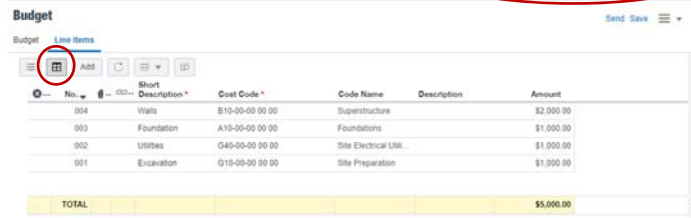
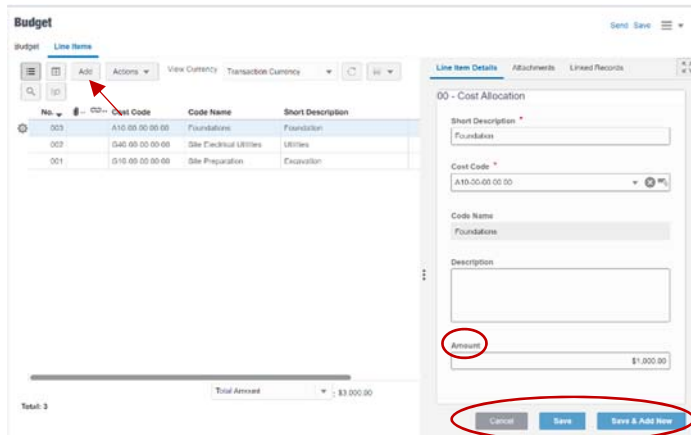
Related Files 3.2.3 Creating and Managing a Budget

1. **Locate** the existing budget record in Tasks, **open** and **select** “Accept”.
2. **Update** previously entered data as needed on the Initial Budget and Line Items tabs. Additional line items may be added if needed.

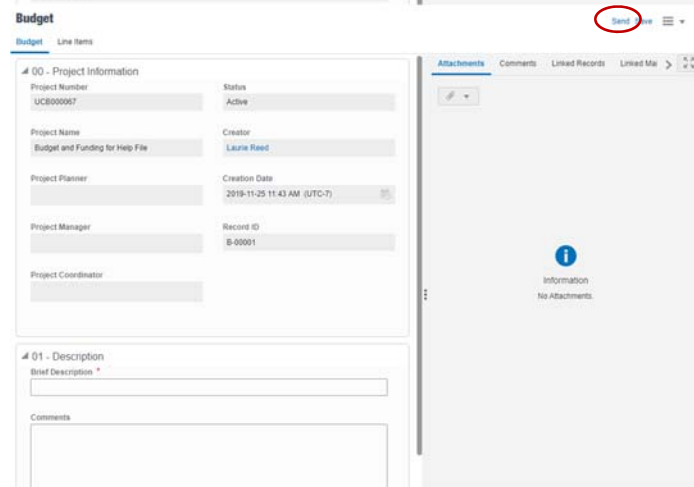
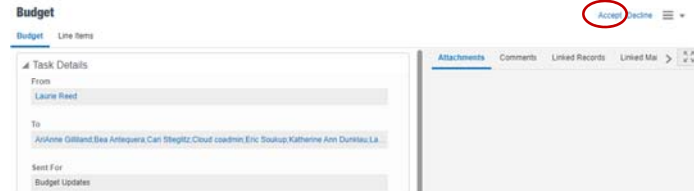
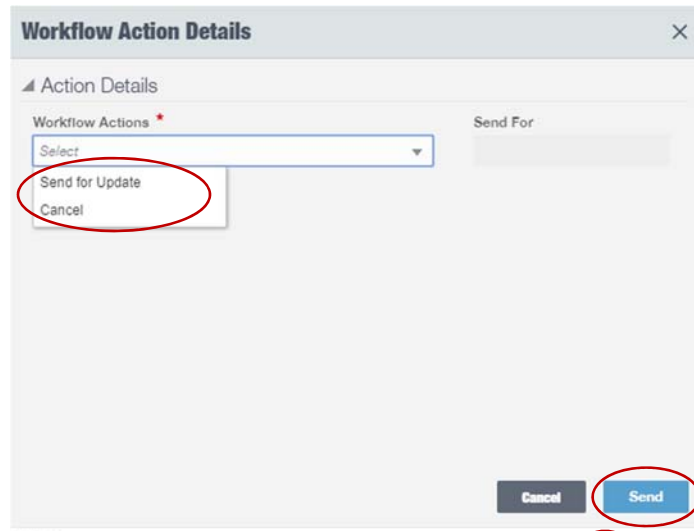
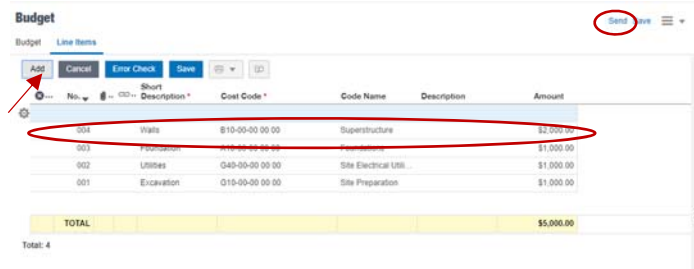
Note: Updates to an existing working budget are made in the existing record.

3. “Amount” updates to existing line items can be done in the “00 – Cost Allocation” pane.
4. Additional line items can be added by **selecting** “Add” as done previously.
5. **Select** “Cancel” to cancel current entry, “Save” to save current entry, or “Save & Add” New to save current entry and add another.
6. **Select** “Send”.

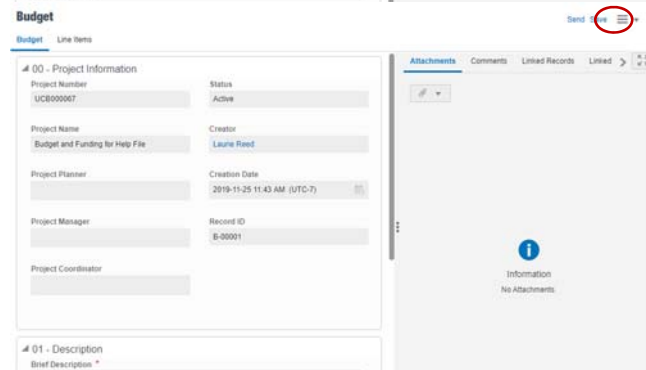
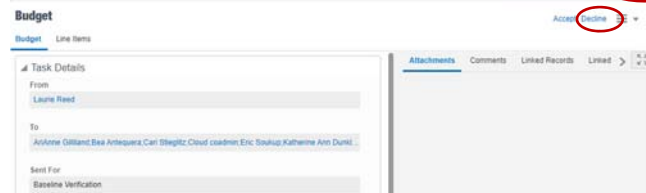
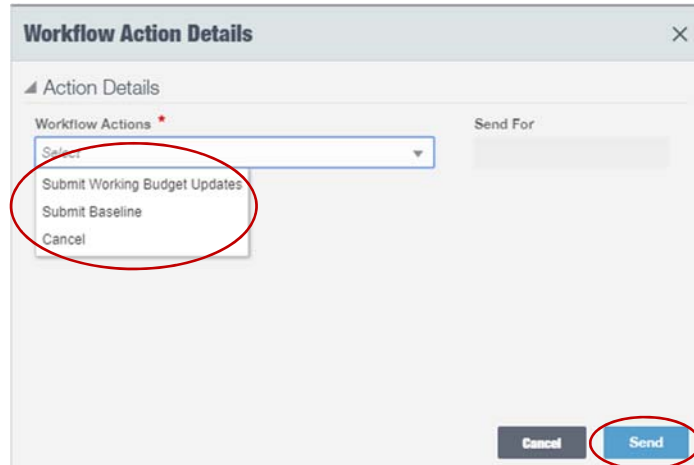
7. Optionally, changes to line items may be done in the grid view by selecting the grid view icon



8. Changes to existing line items are done by **double-clicking** in the field you want to change.
9. Additional lines may be added by **selecting “Add”**. **Double-click** in each field of the new line to add the required data.
10. **Select “Cancel”** to cancel current entry, “Save” to save current entry.
11. **Select “Send”**.
12. **Select “Send for Update”** to update the working budget.
13. **Select “Cancel”** to cancel the budget. This is a terminal step for the project budget.
14. **Select “Send”**.
15. **Locate** the record in Tasks, **open** and **select “Accept”**.
16. **Enter** a new “Brief Description” regarding this update.
17. **Update** previously entered data as needed in the Line Items tabs. Additional line items may be added if needed.
18. **Select “Send”**.

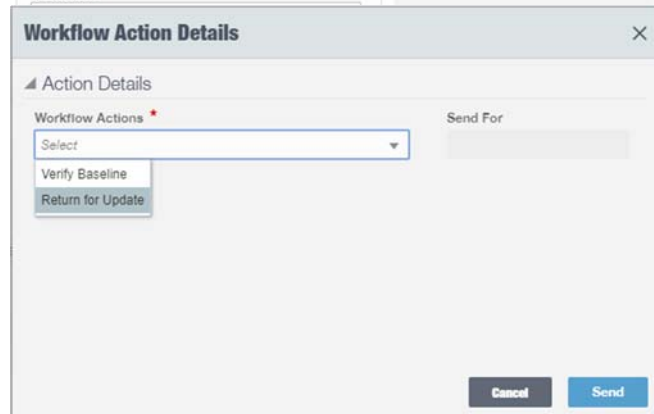


19. **Select** “Submit Working Budget Updates” to send for “Hold for Updates”.
20. **Select** “Submit Baseline” to send for “Baseline Verification”. See Baseline Budget below.
21. **Select** “Cancel” to cancel the budget. This is a terminal step for the project budget.
22. **Select** “Send”.
23. **Wait** until the budget needs to be updated.
24. **Locate** the record in Tasks, **open** and **select** “Accept”.
25. **Review** the budget and make any needed changes to Line Items.
26. **Select** “Send” to open the Workflow Action Details screen.



27. If you are ready to formally baseline the budget, **select** “Verify Baseline” to set the baseline budget. This is a terminal step to the “1 – Working or Baseline Budget” workflow.
 - a. Optionally, **select** “Return for Update” to keep informally updating.

Note: Baselining the budget normally occurs after design is approved but must be completed by the end of schematic design. To make changes after baseline, use the Budget Change or Budget Transfer business processes.



28. **Select** “Send”.

END TASK

3.2.5 VIEWING THE COST BREAKDOWN STRUCTURE AND COST SHEET (UPDATED 02/18/2020)

- Goals** How to view the cost breakdown structure and the cost sheet.
- Navigation** Project>Budget Funding Management>Cost Sheet
- Action By** Project Team
- Pre-requisites** Approved Funding.
- Related Files** None.

Action By: Project Team

1. **Navigate** to Project>Budget Funding Management>Cost Sheet

Example

Cost Sheet

Create Actions View All

Name	Reference No.	Date Created	Created By	Type
Project Cost Sheet		08/24/2018	Cloud coadmin	Cost

Open

CBS Code	CBS Item	Allocated Funding (C)	Baseline Budget (D)
1 C01-00-00.01.00	Construction - New	\$0.00	\$8,000.00
59 C01-00-00.02.00	Construction - Renovation	\$0.00	\$0.00
172 C01-00-00.03.00	Construction - Repairs	\$0.00	\$0.00
175 C01-00-00.04.00	Facilities Management	\$0.00	\$0.00

2. **Select** "Open" or double-click on the Name
3. **Note** the following:
 - a. All Cost Codes and the names allocated will appear.
 - b. Base Cost Codes appear upon opening.
 - c. Value at the base cost code a sum of the sub-cost codes.
 - d. Clicking on the plus (+) symbol expands the field to show all cost codes under the base cost code.
 - e. Clicking on the minus (-) symbol will collapse the field.

- f. Cost items are displayed across the top bar of the Cost Sheet. Values for each column are populated by project business processes.

CBS Code	CBS Item	Allocated Funding (C)	Baseline Budget (D)
1 C01-00-00.01.00	Construction - New	\$0.00	\$8,000.00
2 C01-00-00.00.00	Construction - New	\$0.00	\$8,000.00
27 C02-00-00.00.00	Design/Build Gen1 Contractor GCs	\$0.00	\$0.00
32 C02-00-00.10.00	Contractor Fee - CM/OC	\$0.00	\$0.00
40 C02-00-00.20.00	Design/Build Entry Fee	\$0.00	\$0.00
57 C04-00-00.00.00	Place Holder	\$0.00	\$0.00
58 C05-00-00.00.00	Place Holder	\$0.00	\$0.00
59 C01-00-00.00.00	Construction - Renovation	\$0.00	\$0.00

Action By: Project Team

Example

- Select** a link of the column name to open a window displaying column details, including the formula for value calculations.
- Select** the value link to expand cost code opens a window displaying all the business processes that equal the value of the cost code.
- Note** the example of the cost code structure and that base cost codes can be expanded to drill down further into the cost code.

CBS Code	CBS Item
C01-00-00 01 00	Construction - New
C01-00-00 00 00	Construction - New
C03-00-00 00 99	Design/Bid/Build Gen'l Contractor GCs
C03-00-00 00 00	Contractor Bonds
C03-00-00 00 01	Contractor Insurance
C03-00-00 00 02	Contractor General Conditions
C03-00-00 00 03	Place Holder
C03-00-00 10 99	Contractor Fee - CM/GC
C03-00-00 20 99	Design/Build Entity Fee
C03-00-00 20 00	A/E Fee
C03-00-00 20 10	Pre-Design Phase
C03-00-00 20 11	Schematic Design Phase
C03-00-00 20 12	Design Development Phase
C03-00-00 20 13	Cstr Document Phase
C03-00-00 20 14	Bidding Phase
C03-00-00 20 15	Contract Administration Phase
C03-00-00 20 16	Post Construction Phase
C03-00-00 20 17	Reimbursables
C03-00-00 20 18	D/B Fee
C04-00-00 00 00	Place Holder
C05-00-00 00 00	Place Holder
C01-00-00 02 00	Construction - Renovation

END TASK

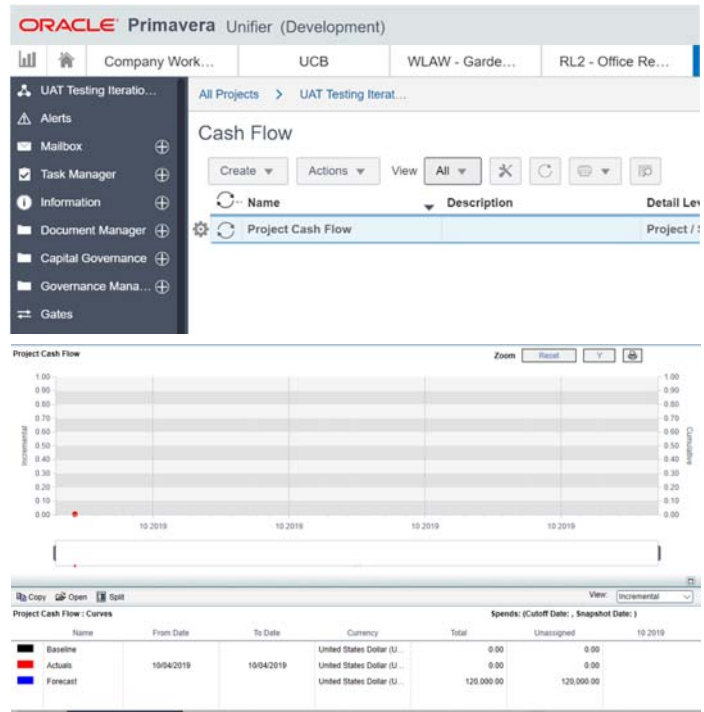
3.2.6 VIEWING CASH FLOW (UPDATED: 10/24/2019)

- Goals** How to view the cash flow. (Capital)
- Navigation** Project>Budget Funding Management>Cash Flow
- Action By** Project Team
- Pre-requisites** None.
- Related Files** None.

Action By: Project Team

Example

1. **Navigate** to Project>Budget Funding Management>Cash Flow.
2. **Note** that a default cash flow is created.
3. **Double-click** to open Project Cash Flow.
4. **Note** that the schedule dates create the cash flow start and end.
5. **Returns** to cash flow as project progresses to see recalculations based on actuals.
6. **Closes** cash flow.



END TASK

3.2.7 REQUESTING CHANGES TO FUNDS (UPDATED: 11/26/2019)

- Goals** How to request changes to funds and reallocate them to the cost code breakdown.
- Navigation** Project>Budget Funding Management>Cost Sheet & Funding Sheet
- Action By** Project Team
- Pre-requisites** Approved funding
- Related Files** 3.2.1 Requesting Funds for Non-Capital Projects
3.2.2 Requesting Funds for Capital Projects

Action By: Project Team

Example

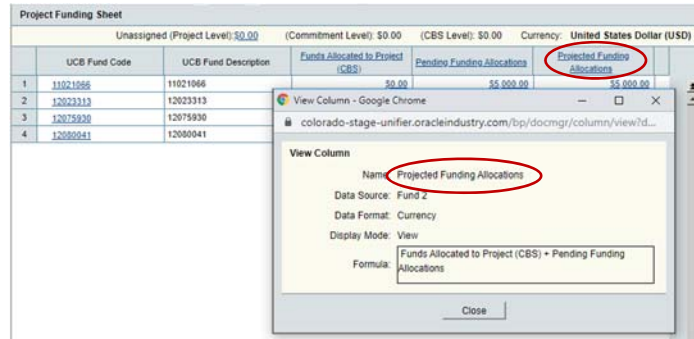
1. **Navigate** to Project>Budget Funding Management>Cost Sheet and reviews the budget to funding numbers.
2. **Notes** gaps and determines more information is needed.
3. **Navigate** to Project>Budget Funding Management>Funding Sheet to find out more detail on current funding situation.
4. **Open** the Funding Sheet by clicking "Open" or double clicking on "Funding Sheet".
5. **Note** all allocated and pending funding is displayed
6. **Clicking** on a "UCB Fund Code" opens a window displaying fund attributes.

The screenshot displays the Oracle Project Cost Sheet interface. At the top, a grid lists various UCB codes and their descriptions, such as 'Construction - New' and 'Medical Management'. Below this, a 'Funding - Current View: All' window is open, showing a table with columns for 'UCB Fund Code', 'UCB Fund Description', 'Funds Allocated to Project (CBS)', 'Pending Funds Allocation', and 'Projected Funds Allocation'. The 'Funding Sheet' link is circled in red. At the bottom, a 'Fund Detail' window for UCB Fund Code 11021066 is shown, with the code and description circled in red. The 'Fund Attributes' section shows details like 'Fund Code Description: Facilities Planning' and 'Fund Category: Budget'.

Action By: Project Team

Example

7. **Clicking** on a column title opens a window displaying column attributes.



8. If more funding needed, **completes** additional funding requests. (See help files 3.2.1 Requesting Funds for Non-Capital Projects or 3.2.2 Requesting Funds for Capital Projects)

END TASK

3.2.8 VIEWING BOB (ACTUALS) IN UNIFIER (UPDATED: 4/9/2020)

Goals How to view and update BOB (actuals) for the project. BOB brings in actuals from PeopleSoft for allocation to the cost sheet.

Navigation Project>Budget & Funding Management>BOB

Action By FM Accounting / Project Manager (PM) / Planner

Pre-requisites Notification of a new BOB record.

Related Files None.

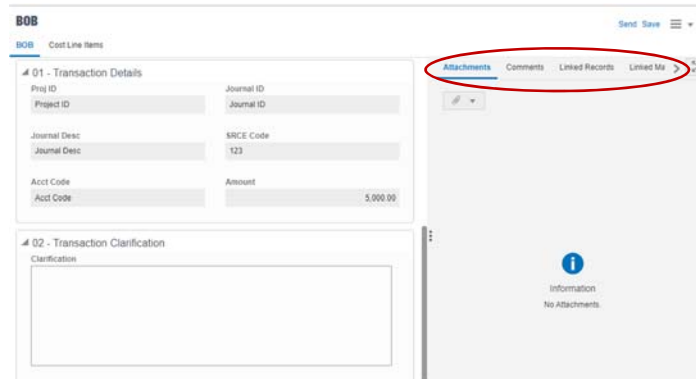
Action By: FM Accounting

Example

1. **Receive** notification of a new BOB record.

Note: Any actuals allocated to Parking or OIT will automatically appear without a task. Actuals that need allocation will come in as a miscellaneous cost and will need to be allocated by the project team.

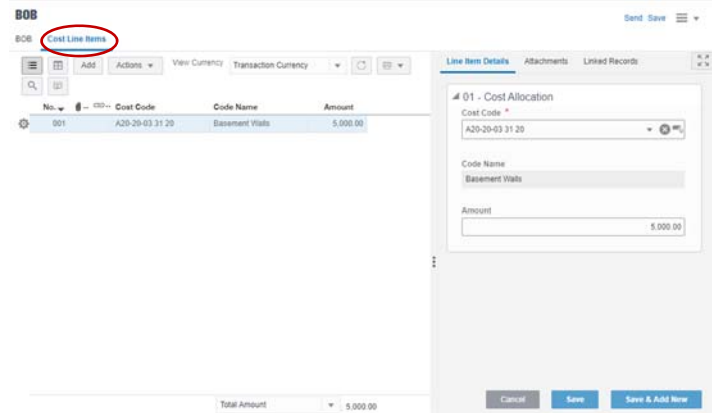
2. **Navigate** to Project>Budget & Funding Management>BOB
 - a. Optionally, **locate** the record in their Tasks,
3. **Open** and **accept** the task.
4. **Review** the data. Transaction details will be populated via the integration process. These cannot be edited.
5. **Add** Transaction Clarification as needed
 - a. Optionally, **add** Notes, Attachment, Comments, etc. as needed.



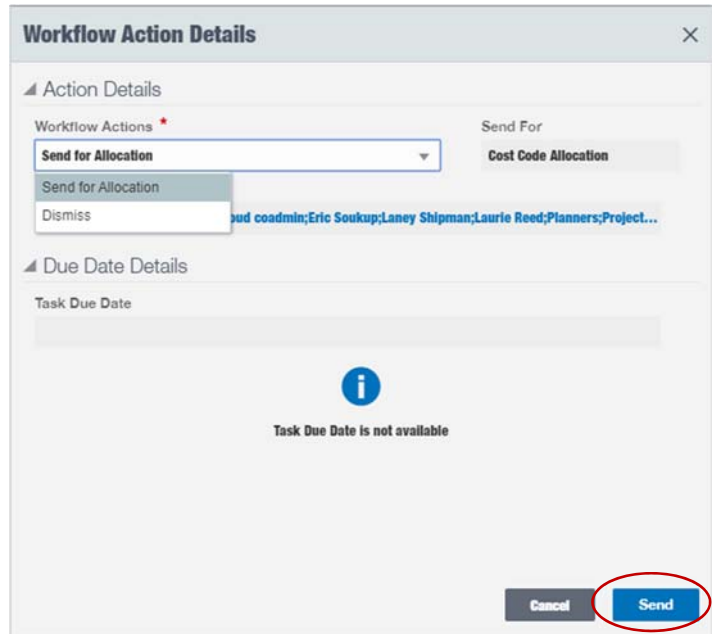
Action By: FM Accounting

Example

6. **Review** Cost Allocation allocated to miscellaneous. This will be updated by the project team in the next step.
7. **Select** “Send” to open the Workflow Action details screen.



8. **Select** “Send for Allocation” to send the record to the PM, or Planner for Cost Code Allocation.
 - a. Optionally, **select** Dismiss to send the record to End and is a terminal step. Dismiss would be chosen if FM Accounting determines the cost should not be allocated to the project
9. **Select** “Send.”



Action By: PM / Planner

Example

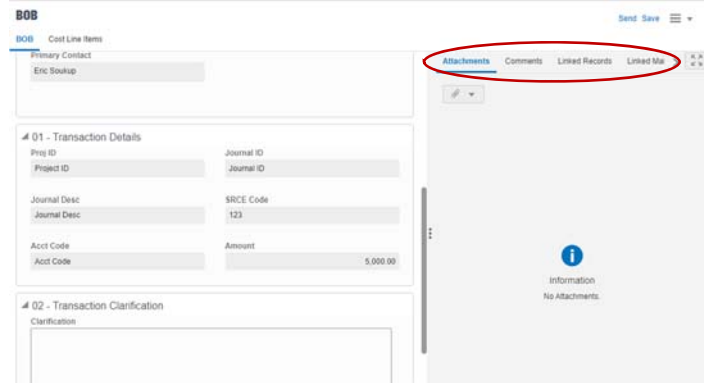
10. Recipient **receives** notice of a task for Cost Code Allocation.
11. **Navigate** to Project>Budget & Funding Management>BOB
 - a. Optionally, **locate** the record in their Tasks,
12. **Open** and **accept** the task.



Action By: PM / Planner

Example

13. **Review** all data including any additional transaction clarifications from FM Accounting.
14. **Add** Notes, Attachment, Comments, etc. using the buttons indicated.



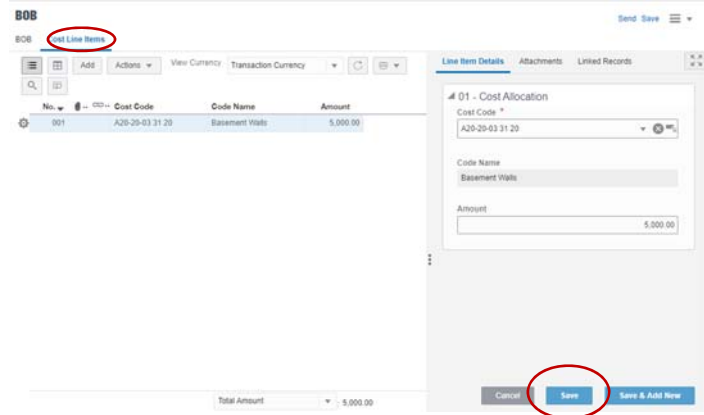
15. Optionally, **navigate** to the cost sheet to ensure you have funds available in the destination line item prior to reallocating.

Note: This would not stop you from allocating but would cause a negative number that would need to be corrected.

Line Item	Cost Item	Allocated Line C	Allocated Amount	Original Amount	Original Currency	Original Date	Original Description
1	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
2	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
3	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
4	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
5	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
6	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
7	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
8	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
9	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
10	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
11	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
12	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
13	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
14	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
15	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
16	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
17	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
18	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
19	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
20	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
21	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
22	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
23	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
24	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
25	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
26	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
27	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
28	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
29	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
30	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
31	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
32	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
33	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
34	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
35	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
36	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
37	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
38	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
39	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
40	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
41	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
42	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
43	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
44	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
45	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
46	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
47	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
48	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
49	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc
50	01-01-01-01	Construction - Misc	\$149	\$1,000.00	USD	10/20/20	Construction - Misc

16. **Select** "Cost Line Items" at the top of the window to allocate cost codes.

Note: The actual expense came in at miscellaneous and needs to be updated to the correct code.

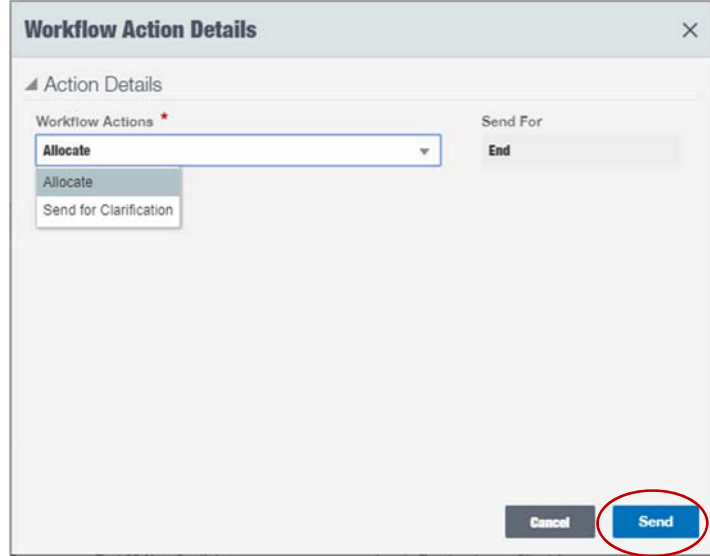


17. **Select** the line item by clicking on it once.
18. In the cost code allocation screen, **clear** the current cost code.
19. **Select** the new cost code.
20. **Select** "Save".
21. **Select** "Send" to open Workflow Actions window.

Action By: PM / Planner

Example

22. **Select** “Allocate” to send the record to End. Note this is a terminal step.
 - a. Optionally, **select** “Send for Clarification” to send the record to FM Acct Clarification for clarification and
 - b. FM Accounting could then resubmit to the PM / Planner. Resubmit.



END TASK

3.2.9 COMPLETING FINANCIAL CLOSEOUT (UPDATED 4/9/2020)

Goals How to complete a financial closeout.

Navigation Project>Governance Management>Financial Closeout

Action By FM Accounting

Pre-requisites None.

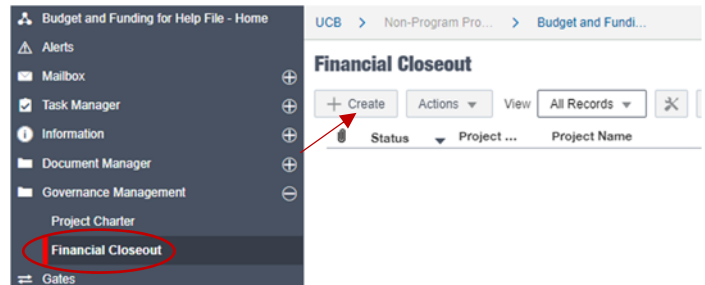
Related Files None.

Action By: FM Accounting

Example

1. **Navigate** to Project> Governance Management>Financial Closeout

2. **Select** “Create”.



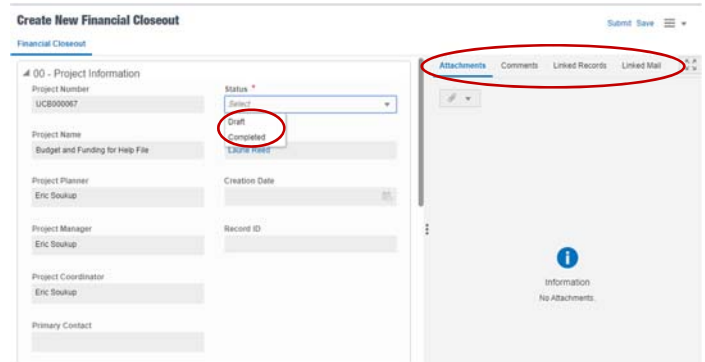
3. In 00 – Project Information **note** greyed fields will auto-populate as appropriate.

4. **Enter** data for red asterisk fields.

5. **Choose** “Status” from the drop down.

Note: This record will remain in Draft until it is complete. Draft will only be visible to the Creator.

6. **Add** attachments, Comments, etc. using the buttons on the right-hand side.



Action By: FM Accounting

Example

7. In 01 – Financial Closeout Checklist, **enter** data for all fields applicable.

Note: Check the boxes when applicable and enter date of the action.

Note: Utility Turnover Completed and Speed Type Inactive fields- If Yes selected, a date must be selected. If NA is selected, field is greyed out.

Note: An error message will be received if a date later than current date is entered.

8. **Select** “Submit” to create the Financial Closeout Record.

a. Optionally **select** “Save” to save as a Draft to complete later.

9. If the record was not fully completed in the steps above, **locate and open** the record.

10. **Select** “Edit”.

11. **Enter** data for all fields as applicable.

12. **Select** “Submit” to continue the record as a draft.

13. **Repeat** steps as often as necessary.

Note: Once all fields are complete, the Status field in 00 – Project Information will be changed to “Complete”.

END TASK

3.2.10 COMPLETING JOURNAL ENTRIES (UPDATED 01/22/2020)

Goals How to complete a journal entry.

Navigation Project>Governance Management>Journal Entries

Action By FM Accounting

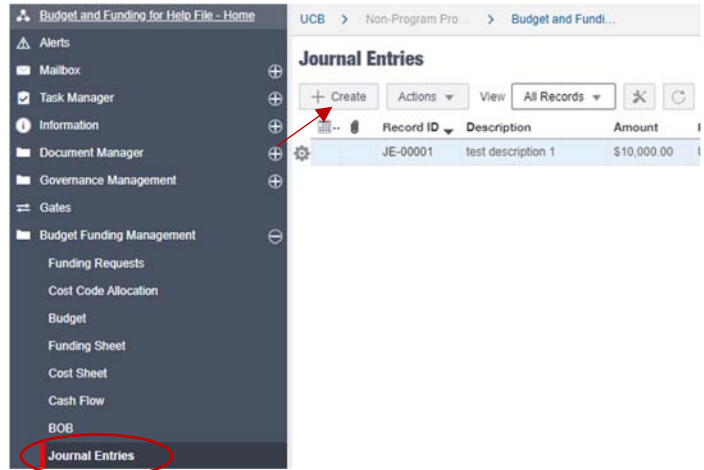
Pre-requisites None.

Related Files None.

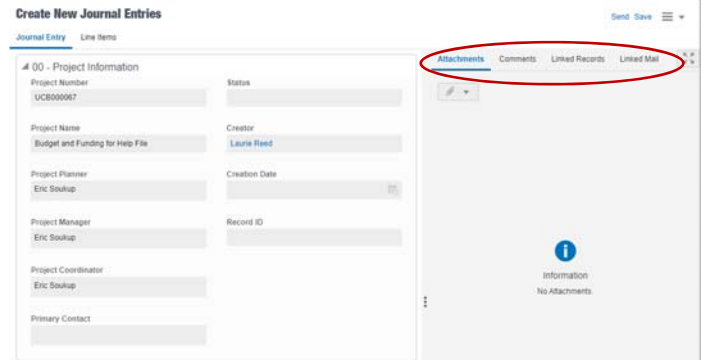
Action By: FM Accounting

Example

1. **Navigate** to Project> Governance Management>Journal Entries
2. **Select** “Create”.



3. In 00 – Project Information note greyed fields will auto-populate as appropriate.
4. Enter data for red asterisk fields.
5. Attachments, Comments, etc. may be added using the buttons on the right-hand side.



6. In 01 – Description **enter** data for red asterisk field. “Amount” will be the sum of “Line Items” and must equal \$0.00.

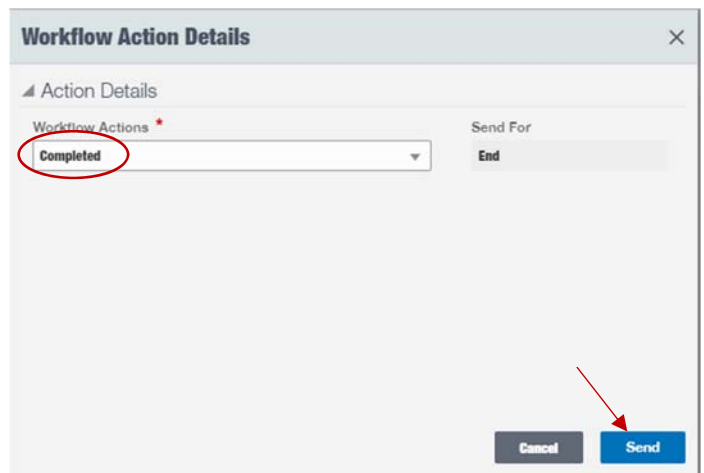
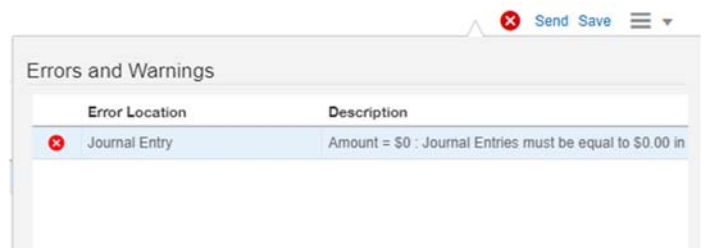
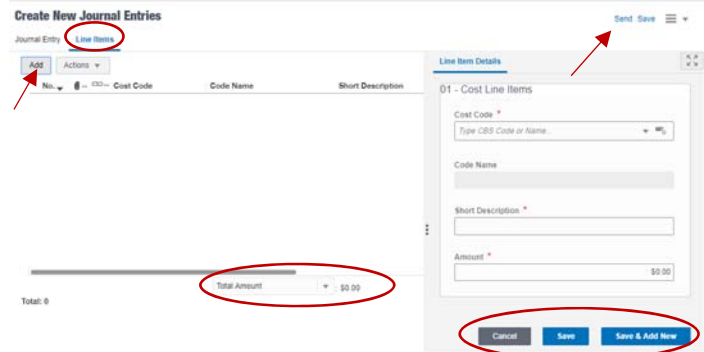


Action By: FM Accounting

Example

7. **Select** “Line Items” at the top of the window.
8. **Select** “Add” to open a window on the right-hand side.
9. **Enter** “Line Item Details”.
10. **Select** “Save” to save current entry.
 - a. Optionally, **select** “Cancel” to cancel the current entry.
11. **Select** “Save & Add New” to save current entry and add another.
12. **Select** “Send” once the sum of all line items equal \$0.00. This will open the Workflow Action Detail screen.

Note: You will receive an error message if “Total Amount” does not equal \$0.00.
13. **Note** in this step “Completed” is the only option and is pre-selected. This is a terminal step.
14. **Select** “Send”.



END TASK

3.2.11 ENTERING MISCELLANEOUS COST ENTRIES (UPDATED 01/22/2020)

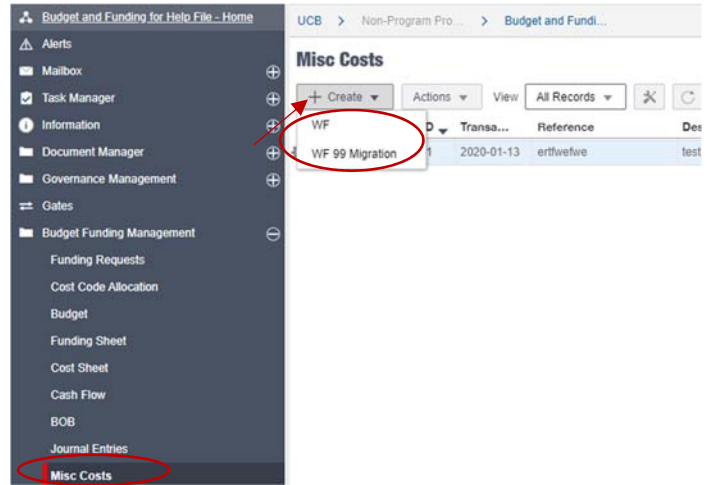
- Goals** How to enter miscellaneous non-labor costs such as OIT, Parking, etc.
- Navigation** Project>Governance Management>Misc. Costs
- Action By** FM Accounting
- Pre-requisites** None.
- Related Files** None.

Action By: FM Accounting

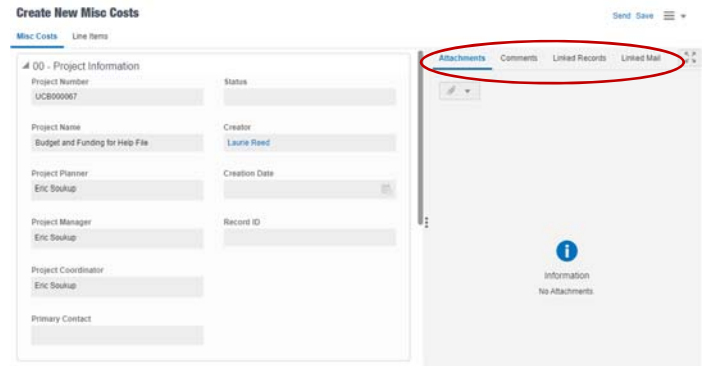
Example

1. **Navigate** to Project> Governance Management>Misc Costs
2. **Select** “Create”.

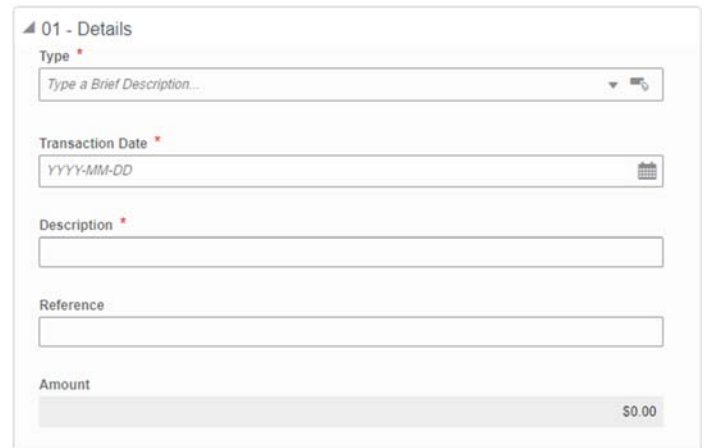
NOTE: There are two workflow options. WF 99 Migration allows for modification of the Extract Date to help with loading legacy data. Data fields and workflow are the same for both workflows.



3. In 00 – Project Information **note** greyed fields will auto-populate as appropriate.
4. **Add** attachments, Comments, etc. using the buttons on the right-hand side.



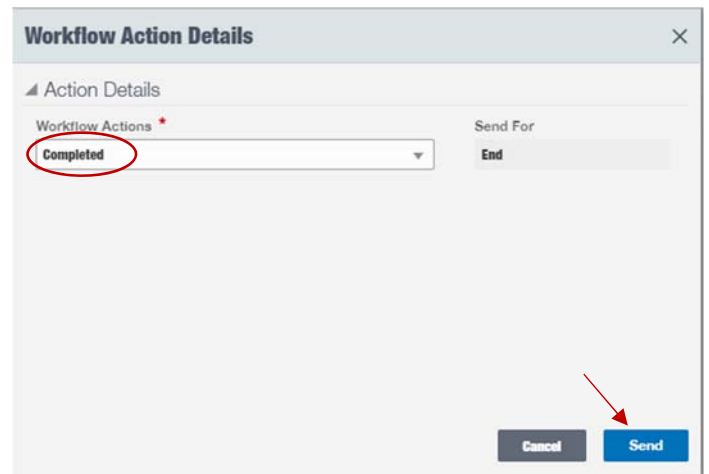
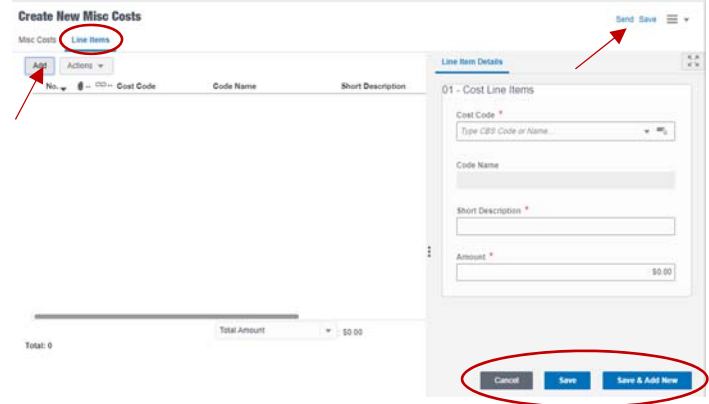
5. In 01 – Description **enter** data for red asterisked fields.
 - a. Note “Amount” will be the sum of “Line Items” and will auto populate.



Action By: FM Accounting

Example

6. **Select** “Line Items” at the top of the window.
7. **Select** “Add” to open a window on the right-hand side.
8. **Enter** “Line Item Details”.
9. **Select** “Save” to save current entry.
 - a. Optionally, **select** “Cancel” to cancel the current entry or “Save & Add New” to save current entry and add another.
10. **Select** “Send” to open the Workflow Action Details screen.
11. Note in this step “Completed” is the only option and is pre-selected. This is a terminal step.
12. **Select** “Send”.



END TASK

3.3 CONTRACT & PROCUREMENT MANAGEMENT

3.3.0 INTRODUCTION (UPDATED 4/14/2020)

Contract and procurement processes encompass the Bid, RFQ, RFP processes to award. Once awarded, professional agreements, construction agreements and modifications will all be captured and managed for changes.

Procurement processes (coming in 2020) will allow for invited Vendors to respond specifically to respond at a much more detailed line item level than before. By asking our Vendors to respond at the level we would issue the work, we can compare responses more effectively across the top three responders. In addition, those responses can be used to automate creation of the agreements.

The Cost Breakdown Structure (CBS) used in Budgeting will be the same CBS used in the contracts. The workflow includes timing for it to be routed for DocuSign and uploaded back into Unifier for record keeping. Establishing a contract (professional services or construction services) will establish a schedule of values (SOV) that allows tracking against each line item in the contract. Modifications processed will automatically update the contract's SOV.

Invoicing an agreement will follow two views: The professional agreement will maintain a more straight-forward way of managing line items and invoicing against them. The construction agreement will include pay application features like retainage and materials stored on site.

One of the primary benefits of managing contracts in the new PMS means that you will not have to re-type your information for the state forms. These are included as part of each agreement, modification and invoice.

Changes, or modifications, are found under Section 3.4 Change Management.

3.3.1 MANAGING RFQS (TO BE RELEASED 2020)

- Goals** How to initiate and manage a Request for Qualifications (RFQ)
Navigation Project>Contract Procurement & Management>RFQ
Action By All Users
Pre-requisites Approval to release RFQ.
Related Files None

3.3.2 MANAGING RFPS (TO BE RELEASED 2020)

- Goals** How to initiate and manage a Request for Proposal (RFP)
Navigation Project>Contract Procurement & Management>RFQ
Related Files Any relating to earlier communications with requesting Department.

3.3.3 ISSUING AN AUTHORIZATION TO BID (TO BE RELEASED 2020)

- Goals** How to issue an authorization to Bid
Navigation Project>Contract Procurement & Management>RFQ
Action By Project Team
Pre-requisites
Related Files

3.3.4 INITIATING A BID (TO BE RELEASED 2020)

- Goals** How to initiate and manage a Bid
Navigation Project>Contract Procurement & Management>Bid
Action By Project Team
Pre-requisites
Related Files

3.3.5 RESPONDING TO A BID (TO BE RELEASED 2020)

- Goals** How to initiate and manage a Bid
Navigation Project>Contract Procurement & Management>Bid
Action By Invited Vendor
Pre-requisites
Related Files

3.3.6 RESPONDING TO A BID (TO BE RELEASED 2020)

Goals How to initiate and manage a Bid

Navigation Project>Contract Procurement & Management>Bid

Action By Invited Vendor

Pre-requisites

Related Files

3.3.7 CREATING A 5.1 OR 5.2 PROFESSIONAL AGREEMENT (UPDATED 03/10/2020)

Goals How to award a procurement and create a professional agreement, including generating state forms SC-5.1, SC-5.2. Note: Delivery types will have different workflows

Navigation Project > Contract & Procurement Management

Action By Project Manager (PM) or Planner

Pre-requisites Approval for an agreement.
Enough dollar value on the applicable line item(s) in both Funding/Cost Code Allocation and Budget

Related Files Issuing an RFQ (Release in 2020)
3.3.8 Creating a 5.3 Professional Agreement

Action By: Project Manager / Planner

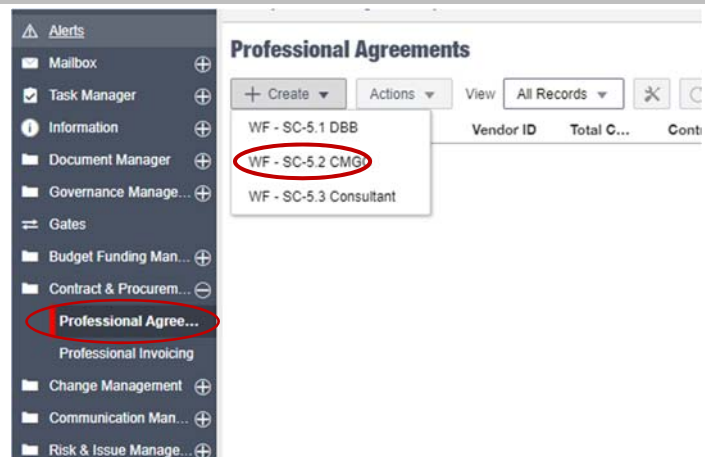
Example

1. **Navigate** to Contracts & Procurement>Professional Agreements in the left-hand panel. Select to open window.

Note: You should have the necessary dollars in place on the applicable line item in both the Budget and Funding Cost Code Allocation prior to initiation of the agreements.

2. **Select** "Create".
3. **Note:** There are workflow (WF) options for the type of agreement you are requesting. Choose the appropriate agreement. Each agreement has similar, but different required fields for data entry.

Note: Options will be limited based on the project phase and project delivery type.



Action By: Project Manager / Planner

Example

4. In this script we will use WF SC-5.2 CMGC as it has the most required fields. **Note** the type of agreement is shown in the top left-hand corner.
 - a. Greyed fields will auto-populate as appropriate.
5. **Add** attachment, Comment, etc. using the buttons on the right-hand side.

6. In 01 - Design Firm Information, **enter** information.
7. **Enter** data for red asterisked fields (required)
8. **Note** address information will auto-populate based on the Vendor chosen but remain editable.

9. In 02 - Purpose of Contract, **enter** the purpose of the contract in a brief manner.

Action By: Project Manager / Planner

Example

10. In 03 - Basis of Compensation, enter data for red asterisked fields (required).

Note: The information in this block will map to the Contract Routing Sheet for agreements >/= to \$1M.

- a. Total Compensation will auto-populate as a total of fields A-H
- b. "Obligation to Pay" will auto-populate as a sum of Cost Line Items (covered later)

03 - Basis of Compensation

A. Pre-Design Phase *	<input type="text" value="0.00"/>	E. Bidding Phase *	<input type="text" value="0.00"/>
B. Schematic Design Phase *	<input type="text" value="0.00"/>	F. Contract Administration Phase *	<input type="text" value="0.00"/>
C. Design Development Phase *	<input type="text" value="0.00"/>	G. Post Construction Phase *	<input type="text" value="0.00"/>
D. Construction Documents Phase *	<input type="text" value="0.00"/>	H. Reimbursable Expenses *	<input type="text" value="0.00"/>
		Total Compensation (Fee)	<input type="text" value="0.00"/>
		Obligation to Pay (\$)	<input type="text" value="0.00"/>

11. In 04 - Contract Recitals, enter data for red asterisked fields (required).

Note: Speedtype can be confirmed by looking at the funding sheet.

- a. Appropriated Funds will auto-populate as a sum of Approved Funding Requests.

Note: Format to be used for spelling out dollar values is: Capitalize the first letter of every word but "and", use hyphen for compound numbers, insert commas same as in numerical format, and do not include the word "Dollars" at the end. The word "Dollars" is included in the custom print.

Examples:

\$567.00

Five Hundred Sixty-Seven and 00/100

\$1,922.00

One Thousand, Nine Hundred Twenty-Two and 00/100

\$32,086.50

Thirty-Two Thousand, Eight-Six and 50/100

04 - Contract Recitals

Speed Type *	<input type="text"/>
Appropriated Funds (\$)	<input type="text" value="\$0.00"/>
Fixed Limit of Construction (\$) *	<input type="text" value="\$0.00"/>
Fixed Limit of Construction (written) *	<input type="text"/>

Action By: Project Manager / Planner

Example

12. In 05 - Condition Precedent Clause, **select** "Yes" or "No".
13. **Note** if Condition Precedent Clause is Yes, all fields are required. If No, the fields are greyed out.
14. **Enter** funding appropriated by date.
15. In 06 - Phases Included, **select** each phase that is included by:
 - a. Clicking the cell
 - b. Typing the letter y
 - c. Selecting the word yes from the drop-down menu

Note: Leave a phase "blank" if it is neither included or excluded.

05 - Condition Precedent Clause

Condition Precedent Clause *

Select

Funding Appropriated By

MM/DD/YYYY

06 - Phases Included

Pre-Design Phase Included

Type a Constant...

Schematic Design Phase Included

Yes

Design Development Phase Included

Yes

Construction Documents Phase Included

Yes

Bidding Phase Included

Type a Constant...

Yes

Post Construction Phase Included

Type a Constant...

Reimbursables Included (CMGC AE)

Type a Constant...

Action By: Project Manager / Planner

Example

16. In 07 - Phases Excluded, **select** each phase that is not included. Note that a phase included is greyed out and not available to be excluded.
17. **Select** each phase that is excluded by
 - a. Clicking the cell
 - b. Typing the letter y
 - c. Selecting the word yes from the drop-down menu

Note: Leave a phase “blank” if it is neither included or excluded.

07 - Phases Excluded

Pre-Design Phase Excluded
Type a Constant...
Yes

Design Development Phase Excluded

Construction Documents Phase Excluded

Bidding Phase Excluded

Const Administration Phase Excluded
Type a Constant...

Post Construction Phase Excluded
Type a Constant...

Reimbursables Excluded (CMGC AE)
Type a Constant...

18. In 08 – Services, **enter** required red asterisked fields. Note they auto-populate but remain editable if necessary.

08 - Services

No. of Design Phases (#) *
0

No. of Bid Packages (#) *
0

No. of Design Phases (written) *

No. of Bid Packages (written) *

Firm's Proposal Date *
MM/DD/YYYY

Action By: Project Manager / Planner

Example

19. In 09 - Principal Representative:

Note: Principle Representative defaults to Ron Ried.

Select the President for agreements >/= to \$5M.

Select David Kang when Ron Ried is out of the office.

20. **Select** principal representative based on routing requirements.

a. No. of working days for total review auto populates with standard number of days. May be edited. If changed, be sure to change the text for number of working days (written).

b. No. of working days for providing GMP auto populates with the standard number of days. May be edited. If changed, be sure to change the text for number of working days (written).

21. **Select** “Send” to open the Workflow Action Details screen.

22. **Note** “Submit” to send for “Define Obligation to Pay” is the only option and is pre-selected.

23. **Enter** the recipient that will review the information entered.

24. **Select** “Send”.

25. Recipient will **locate, open** and **Accept** the task.

09 - Principal Representative

Principal Representative *
Ronald L. Ried, Director, IS Business Se... ▼

No. of Working Days for Total Review of DD (#) *

No. of Working Days for Total Review of DD (written) *

No. of Working Days for Providing GMP at DD (#) *

No. of Working Days for Providing GMP at DD (written) *

No. of Working Days for Total Review of 50% and 95% CD (#) *

No. of Working Days for Total Review of 50% and 95% CD (written) *

No. of Working Days for Total Review of each Bid Package (#) *

No. of Working Days for Total Review of each Bid Package (written) *

Workflow Action Details

Action Details

Workflow Actions *
 Send For

Due Date Details

Task Due Date

i
Task Due Date is not available

Professional Agreements

SC-8.2 CMGC Cost Line Items

Task Details

From
Laure Reed

Attachments Comments Linked Records Linked >

Action By: Project Manager / Planner

Example

26. "Cost Line Items" auto-populate based on the Phases Included.
27. **Highlight** the line to be authorized as an "Obligation to Pay".
28. **Enter** the "Amount".

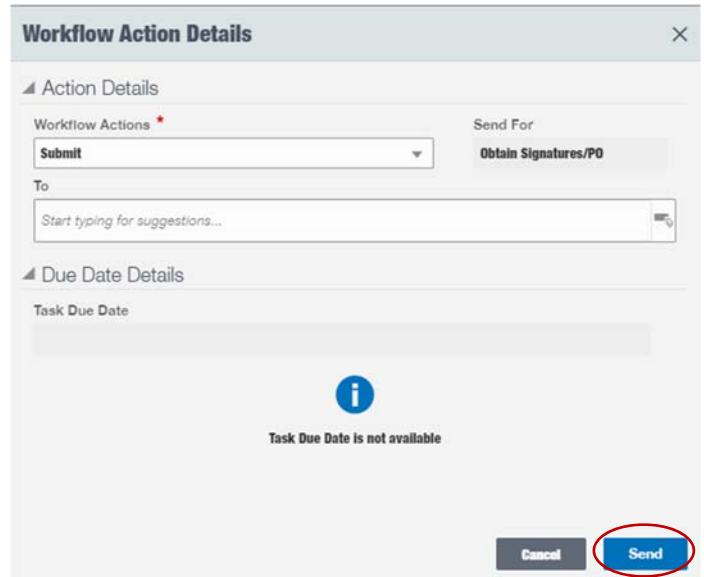
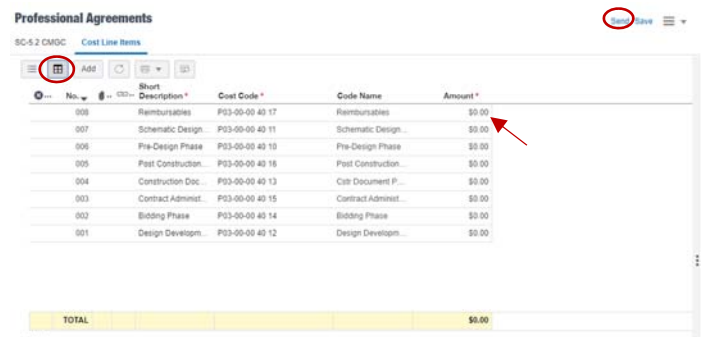
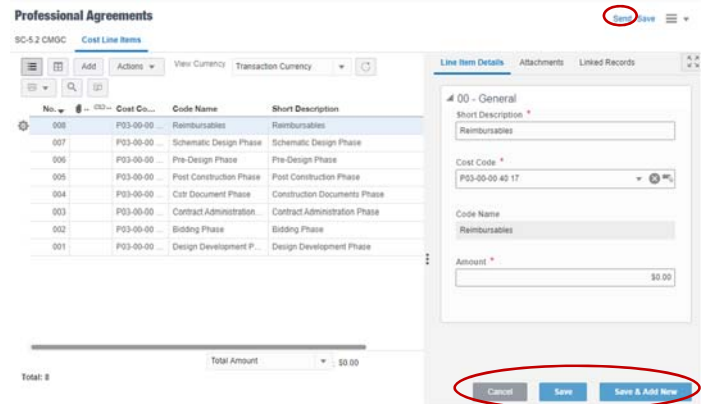
Note: Only enter values for the phases being awarded by the condition precedent clause.

Note: This also allows only awarding, for example, 50% of a design phase.

29. **Select** "Cancel" to cancel the current entry
30. **Select** "Save" to save current entry
31. **Select** "Save & Add New" to save current entry and add another
32. **Select** "Send".

- a. Optionally, the "Amount" for each authorized "Obligation to Pay" may be added using the grid view by **clicking** the icon.

33. **Double-click** in each "Amount" field to add the amount for "Obligation to Pay".
34. **Select** "Send".
35. In Workflow Action Details, **select** "Submit".
36. **Enter** Recipient.
37. **Select** "Send".

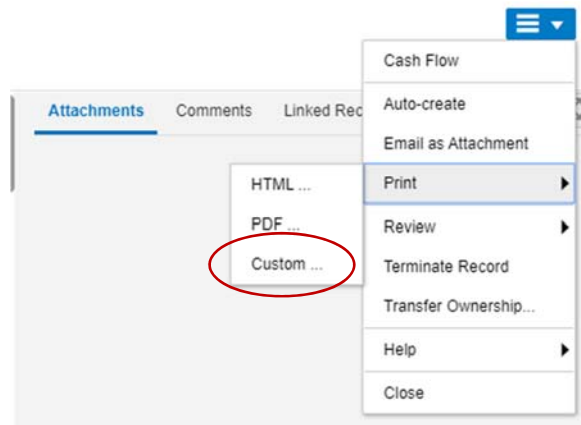


Action By: Project Manager / Planner Example

38. Recipient (PC) **locates, opens** and **accepts** the task.

Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.

39. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom....

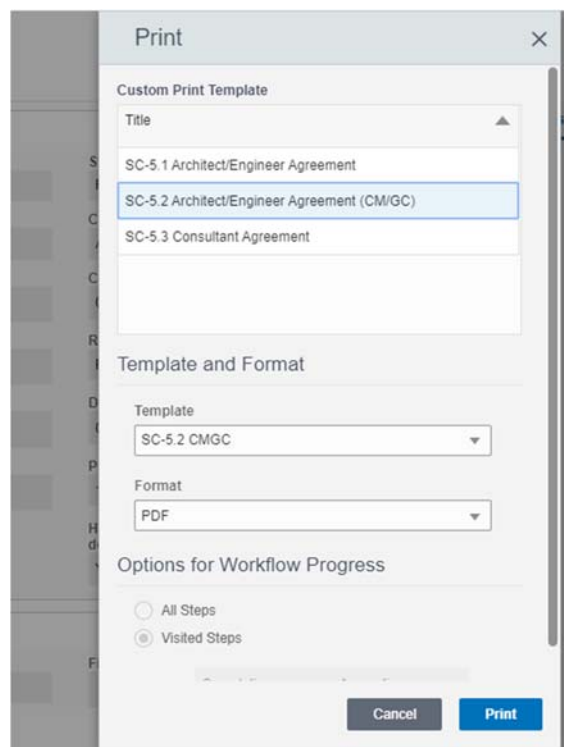


40. **Select** "SC-5.2" to highlight the correct output.

41. **Ensure** the format is PDF.

42. **Select** "Print" to generate the PDF.

43. **Save** the PDF for upload into DocuSign.



44. **Route** agreement through DocuSign with applicable attachments and routing document.

45. Upon executed agreement, **request** PO from Marketplace.

46. **Wait** until all signatures are obtained and the PO is received.

Action By: Project Manager / Planner

Example

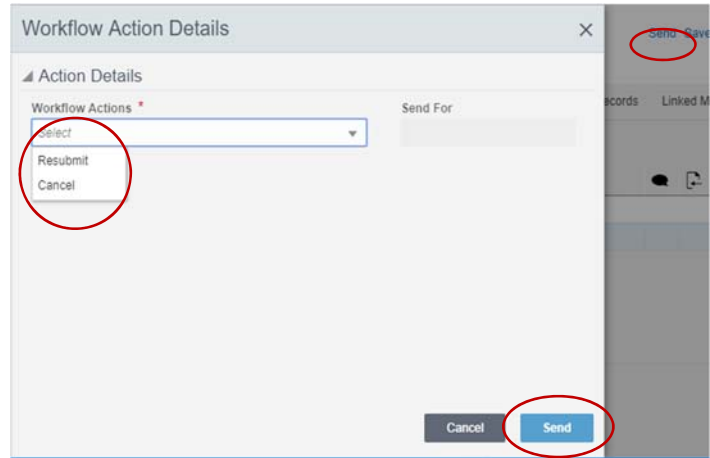
- 47. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 48. **Enter** remaining data for red asterisked fields.
- 49. **Attach** executed agreement and Purchase Order.
- 50. **Select** “Send” to open the Workflow Actions Detail screen. .

- 51. **Select** “Send” to open the Workflow Action Details screen.
- 52. **Select** “Notify Vendor” to send an email notification to the Vendor. Add any CC recipients to also be notified. Note this is a terminal step.
 - a. Optionally, **select** “Decline” sends the Business Process for revision. The Recipient must be entered in the “To” field. Best practice is to add Comments for the reason to Decline.
- 53. **Select** “Send”.

Action By: Project Manager / Planner

Example

54. If “Declined” was selected, creator locates and accepts the task.
55. **Review** Comments provided and **make** corrections as requested
56. **Select** “Send” to open the Workflow Actions screen.
57. **Select** “Resubmit” to resend the Business Process to the Obtain Signatures/PO step.
 - a. Optionally, **select** “Cancel” is a terminal step for the Business Process
58. **Add** the recipient in the “To” field.
59. **Select** “Send”.



END TASK

3.3.8 CREATING A 5.3 PROFESSIONAL AGREEMENT (UPDATED 03/10/2020)

- Goals** How to award a procurement and create a SC-5.3 Consultant agreement.
- Navigation** Project > Contract & Procurement Management
- Action By** Project Manager (PM) or Planner
- Pre-requisites** Approval for an agreement.
Enough dollar value on the applicable line item(s) in both Funding/Cost Code Allocation and Budget
- Related Files** Issuing an RFQ (Release in 2020)
3.3.7 Creating a 5.1 or 5.2 Professional Agreement

Action By: PM or Planner	Example
<ol style="list-style-type: none"> 1. Navigate to Project>Contract & Procurement Management>Professional Agreements. 2. Select "Create". 3. Select "WF SC-5.3 Consultant". 	
<ol style="list-style-type: none"> 4. Note the type of agreement is shown in the top left-hand corner. <ol style="list-style-type: none"> a. Greyed fields will auto-populate as appropriate. 5. Add attachment, Comment, etc. using the buttons on the right-hand side. 	

Action By: PM or Planner

Example

- 6. In 01 - Consultant Information, **select** a consultant using the Consultant Name field.
- 7. **Note** address information will auto-populate based on the Vendor chosen but remain editable.
- 8. **Select** a Firm Contact Name.
- 9. **Complete** all required fields.

01 - Consultant Information

Consultant Name *

Firm Contact Name

Address 1 *

Firm Contact Name *

Address 2

Firm Contact Title *

Address 3

Firm Contact Email *

City *

Zip/Postal Code *

State/Province *

- 10. In 02 - Purpose of Contract, **enter** information.

02 - Purpose of Contract

Purpose of Contract *

- 11. In 03 – Basis of Compensation **enter** data for red asterisked fields
Note: "Compensation" will be a sum of Cost Line Items.

03 - Basis of Compensation

Consultant Compensation (written) *

Compensation

- 12. In 04 – Contract Recitals **note** Speed Type is auto-populated but is editable.

Note: You can confirm the speedtype by looking at the funding sheet.

04 - Contract Recitals

Speed Type *

- 13. In 05 – Scope of Work **enter** data for red asterisked fields

05 - Scope of Work

Firm's Proposal Date *

- 14. In 06 – Principal Representative **note** the field is auto-populated but is editable via the drop down.

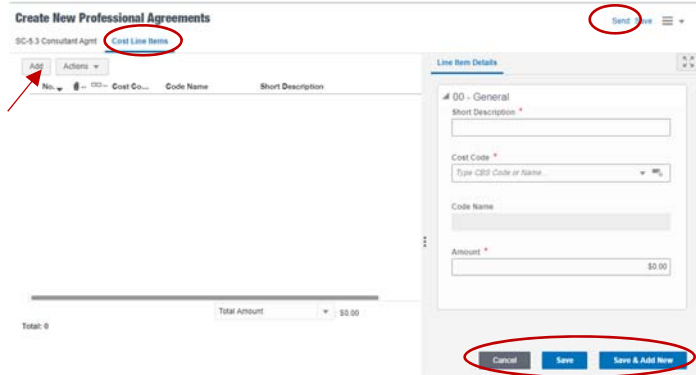
06 - Principal Representative

Principal Representative *

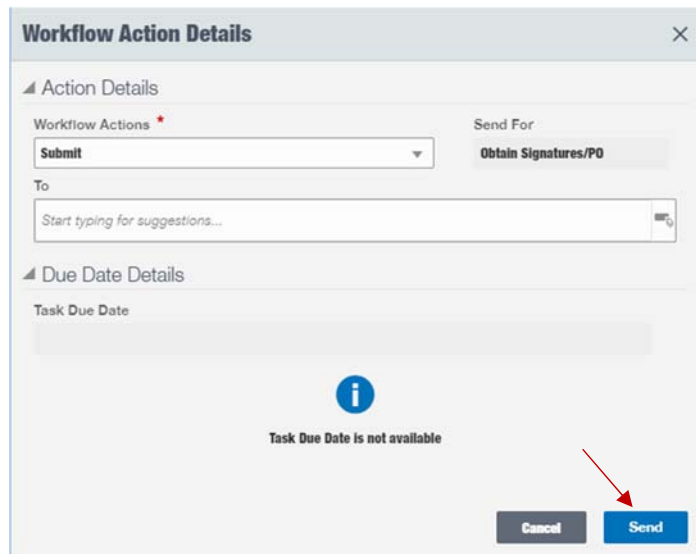
Action By: PM or Planner

Example

15. **Select** “Cost Line Items” at the top of the page
16. **Select** “Add” to open the Line Item Details window.
17. **Enter** data for red asterisked fields
18. **Select** “Cancel” to cancel the current entry
19. **Select** “Save” to save current entry
20. **Select** “Save & Add New” to save current entry and add another
Note: “Total Amount” should equal “Consultant Compensation (written)”
21. **Select** “Send” to open the Workflow Action Details screen.



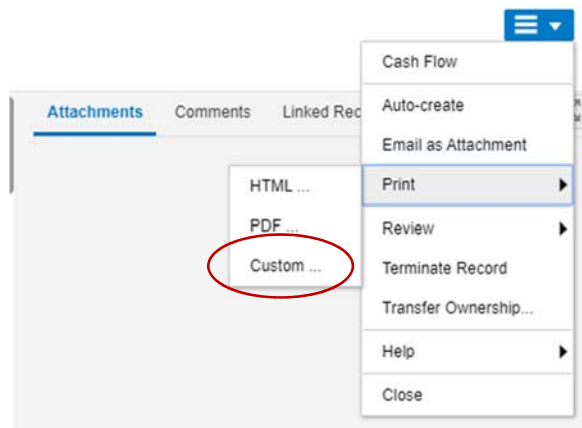
22. **Note** in this step “Submit” is the only option and is pre-selected.
23. **Enter** the recipient in the “To” field.
24. **Select** “Send” to “Obtain Signatures/PO”.



25. Recipient (PC) **locates, opens and accepts** the task.

Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.

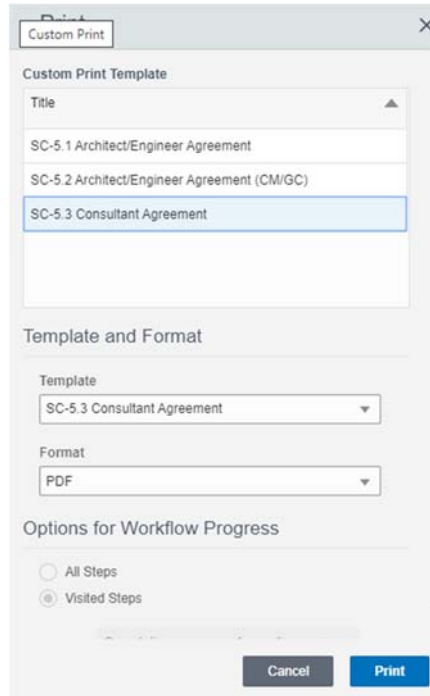
26. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom....



Action By: PM or Planner

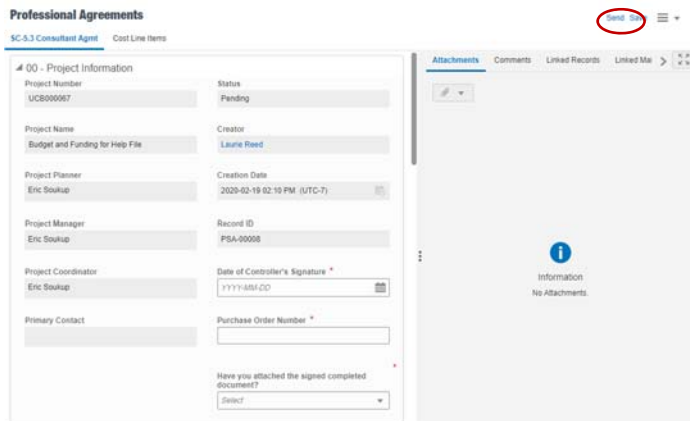
Example

- 27. **Select** “SC-5.3” to highlight the correct output.
- 28. **Ensure** the format is PDF.
- 29. **Select** “Print” to generate the PDF.
- 30. **Save** the PDF for upload into DocuSign.



- 31. **Route** agreement through DocuSign with applicable attachments and routing document.
- 32. Upon executed agreement, **request** PO from Marketplace.
- 33. **Wait** until all signatures are obtained and the PO is received.

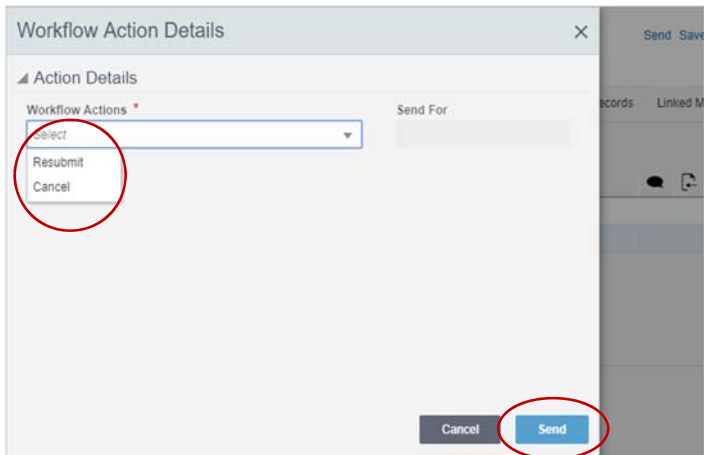
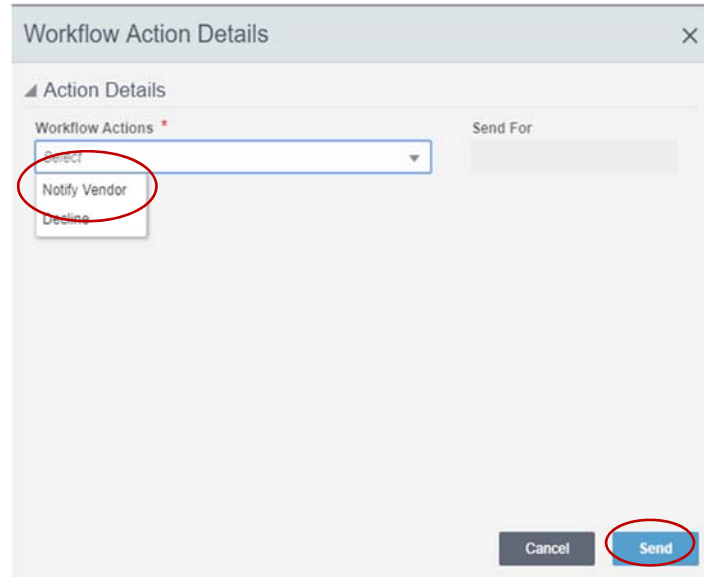
- 34. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 35. **Enter** remaining data for red asterisked fields.
- 36. **Attach** executed agreement and Purchase Order.
- 37. **Select** “Send” to open the Workflow Actions Detail screen. .



Action By: PM or Planner

Example

38. **Select** “Send” to open the Workflow Action Details screen.
39. **Select** “Notify Vendor” to send an email notification to the Vendor. Add any CC recipients to also be notified. Note this is a terminal step.
 - a. Optionally, **select** “Decline” sends the Business Process for revision. The Recipient must be entered in the “To” field. Best practice is to add Comments for the reason to Decline.
40. **Select** “Send”.
41. If “Declined” was selected, creator locates and accepts the task.
42. **Review** Comments provided and **make** corrections as requested
43. **Select** “Send” to open the Workflow Actions screen.
44. **Select** “Resubmit” to resend the Business Process to the Obtain Signatures/PO step.
 - a. Optionally, **select** “Cancel” is a terminal step for the Business Process
45. **Add** the recipient in the “To” field.
46. **Select** “Send”.



END TASK

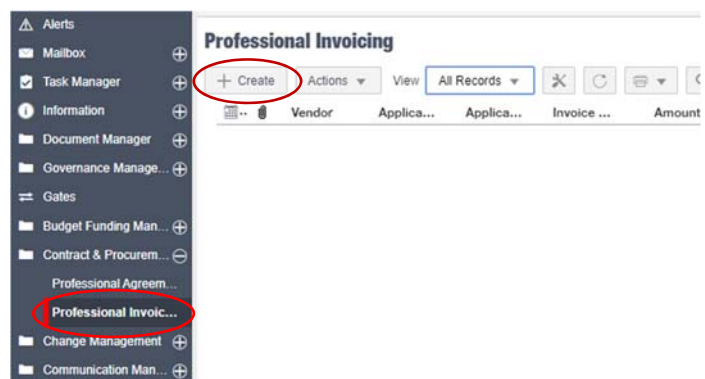
3.3.9 INVOICING A PROFESSIONAL AGREEMENT (UPDATED 03/10/2020)

- Goals** How to initiate an invoice against a professional agreement, including generating state forms
- Navigation** Project>Contract & Procurement Management>Professional Invoicing
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Professional Agreements.
- Related Files** 3.3.7 Creating a 5.1 or 5.2 Professional Agreement
3.3.8 Creating a 5.3 Professional Agreement

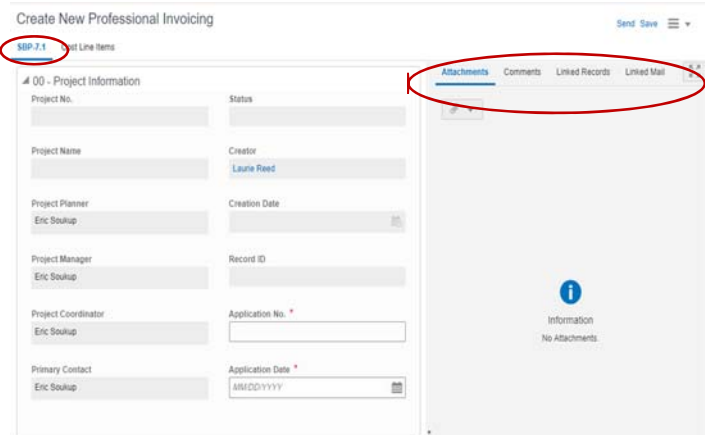
Action By: PM / PC / Planner

Example

1. **Navigate** to Project>Contract & Procurement Management>Professional Invoicing.
2. **Select** “Create”.



3. In 00-Project Information, **note** greyed fields will auto-populate when a Contract/PO reference is selected in Block 01.
4. **Enter** the following information:
 - a. Application No: The unique number of the application.
 - b. Application Date: The date the application was submitted.
5. **Add** attachments, comments, etc. using the buttons on the right-hand side.



Note: Attach vendor's pay application and invoice.

Action By: PM / PC / Planner

Example

6. In 01 - Application Information, **select** the original contract.

- a. Note greyed fields will auto-populate as appropriate.
- b. Greyed fields on the right-hand side are sum formulas based on current plus all past invoices.

7. **Select** “Cost Line Items” at the top of the page.

8. **Select** “Add”.

Note: Approved line items from Agreement plus approved Agreement Modifications will auto-populate.

9. **Enter** “Earned to Date” values based on Vendor’s application form SBP-7.1

Note the error icon if the Earned to Date value entered exceeds Scheduled Value.

- a. “Error Check” will alert you to errors as well.

Ref.	Cost Code	Code Name	Short Description	Effective Date	Earned To Date	Scheduled Value	Requested This Period	Total Completed to Date
001	810-10-09 09 00		SD	06/12/2019 05:00...	3,000.00	3,000.00	0.00	3,000.00
002	810-13-05 30 00		DD	06/12/2019 05:00...	4,000.00	4,000.00	0.00	4,000.00
003	810-16-05 35 00		CD	06/12/2019 05:00...	5,500.00	5,000.00	500.00	5,500.00
004	810-19-05 40 00		Expenses	06/12/2019 05:00...	2,000.00	2,000.00	0.00	2,000.00
005	810-23-05 30 00		Bid	06/12/2019 05:00...	1,000.00	1,000.00	0.00	1,000.00
006	820-18-07 24 00		Construction Phase	06/12/2019 05:00...	4,500.00	5,000.00	500.00	4,500.00
007	830-11-07 32 00		Post Construction	06/12/2019 05:00...	2,000.00	3,000.00	1,000.00	2,000.00
TOTAL					22,000.00	23,000.00	2,000.00	22,000.00

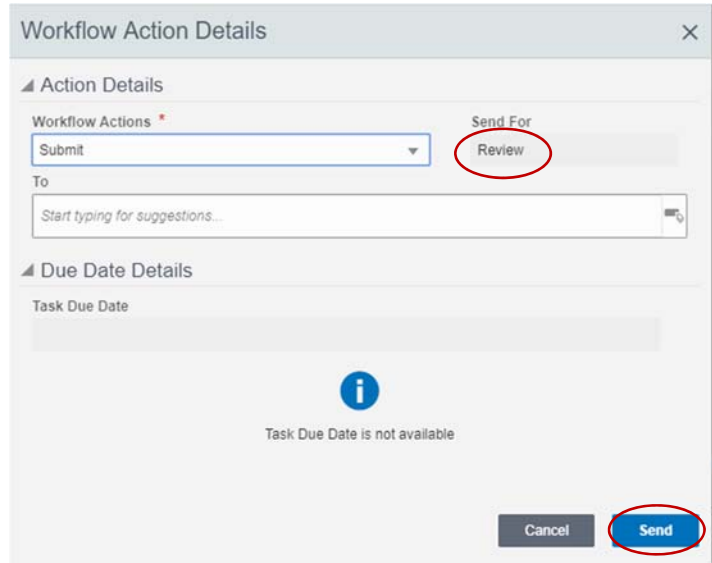
10. **Select** “Save” to save current entry.

11. **Select** “Send” to send the Business Process into the workflow. Select Save to save as a draft and complete later.

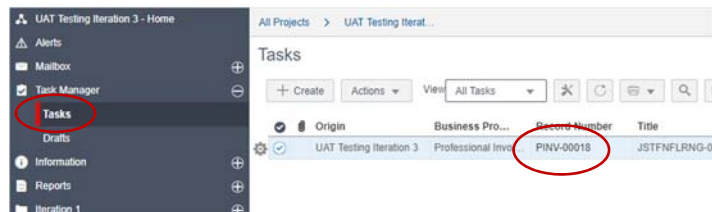
Action By: PM / PC / Planner

Example

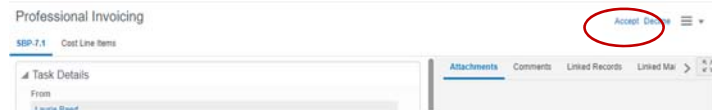
12. **Select** “Send” to open the Workflow Action Details screen.
13. **Note** in this step “Submit” is the only option and is pre-selected.
14. **Add** recipients in the “To” field.
15. **Select** “Send” to send for Review



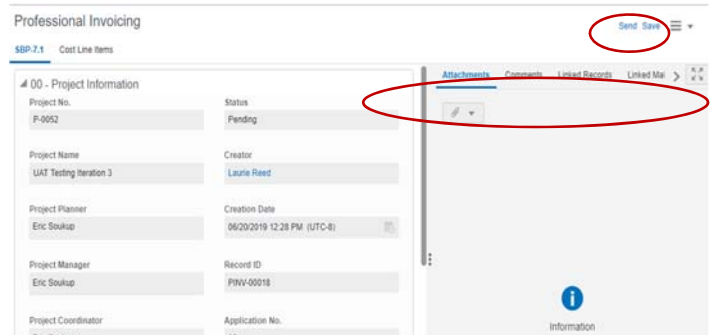
16. Recipient **locates** their Task and **opens** the record.



17. **Select** “Accept” to open the record.



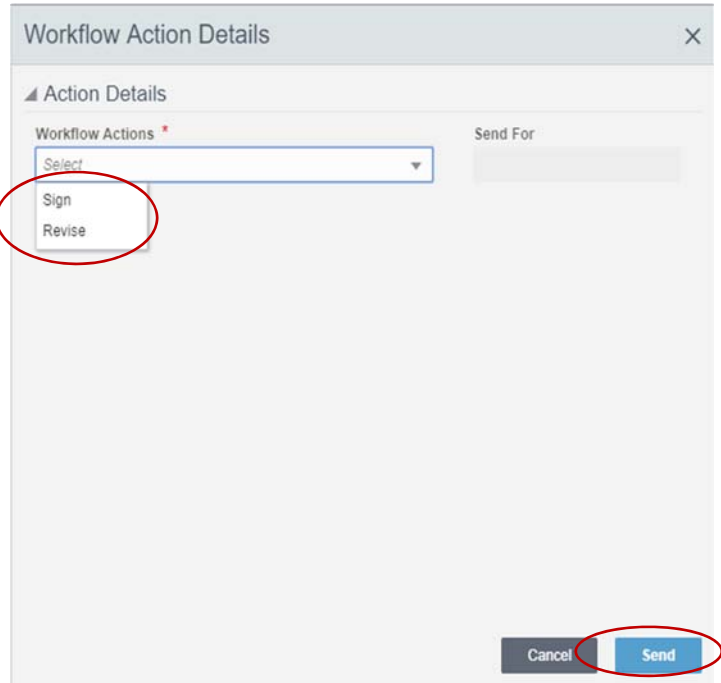
18. **Review** all data entry, attachments, comments, etc.
19. **Add** attachments, comments, etc. as necessary.
20. **Select** “Send” to open the Workflow Action Details screen.



Action By: PM / PC / Planner

Example

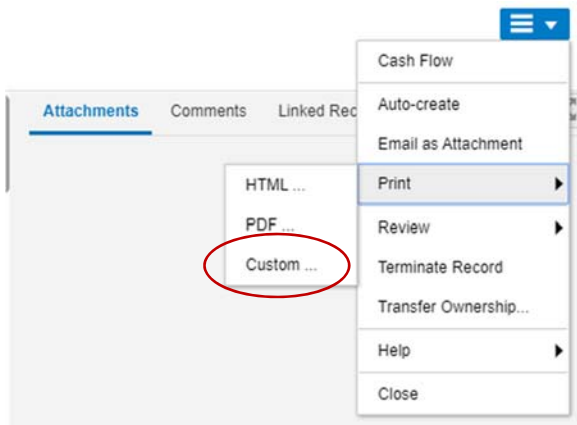
21. **Select** “Sign” will send the Business Process for Obtain Signature
 - a. Optionally, **select** “Revise” to send the Business Process for revision and resubmit. Best practice is to add Comments for the reason to Revise.
22. **Add** the recipient in the “To” field.
23. **Select** “Send” to send for signature of the 7.2.



24. Recipient (PC) **locates, opens and accepts** the task.

Note: In this step the PC will obtain signatures outside of Unifier and upload the executed pay application and invoice to Unifier.

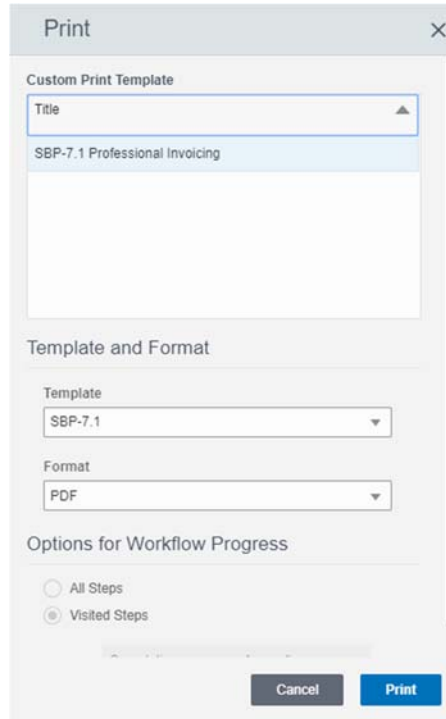
25. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom....



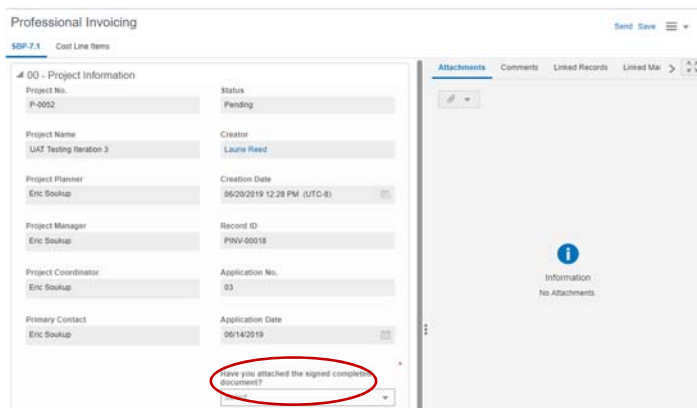
Action By: PM / PC / Planner

Example

- 26. **Select** “SBP-7.1” to highlight the correct output.
- 27. **Ensure** the format is PDF.
- 28. **Select** “Print” to generate the PDF.
- 29. **Save** the PDF for upload into DocuSign.



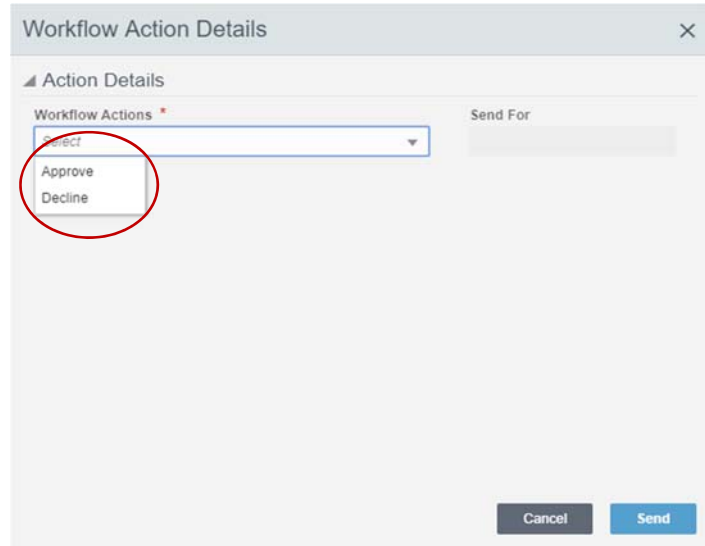
- 30. **Route** agreement through DocuSign with applicable attachments and routing document.
- 31. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 32. **Enter** remaining data for red asterisked fields.
- 33. **Attach** the signed document.
- 34. **Select** “Send” to open the Workflow Actions Detail screen. .



Action By: PM / PC / Planner

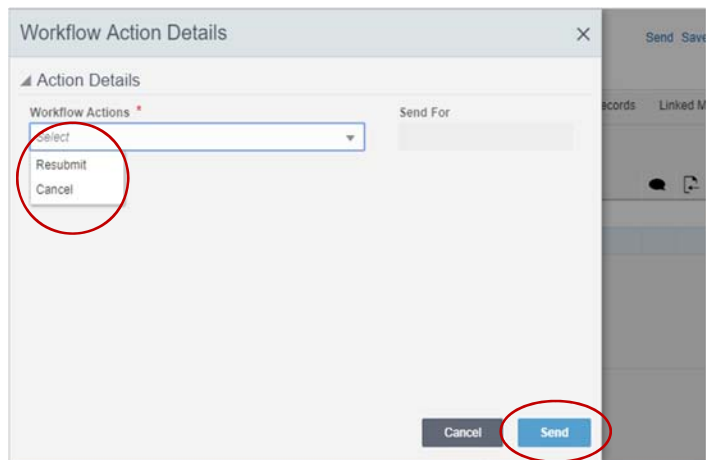
Example

- 35. **Select** “Approve” to send an email notification to the Vendor. This is a terminal step for the Business Process.
 - a. Optionally, **select** “Decline” to send the Business Process for revision. Best practice is to add Comments for the reason to Decline.



- 36. **Select** “Send”.

- 37. If “Declined” was selected, creator locates and accepts the task.
- 38. **Review** Comments provided and **make** corrections as requested
- 39. **Select** “Send” to open the Workflow Actions screen.
- 40. **Select** “Resubmit” to resend the Business Process to the Sign step.
 - a. Optionally, **select** “Cancel” is a terminal step for the Business Process



- 41. **Add** the recipient in the “To” field.
- 42. **Select** “Send”.

END TASK

3.3.10 CREATING A CONSTRUCTION AGREEMENT (UPDATED 03/11/2020)

Goals How to award a procurement and create a construction agreement. Note: Delivery types will have different workflows. This will be used for:

- Design Bid Build (SC-6.21)
- CMGC (SC-6.4)
- Design Build LS (SC-8.0)
- Design Build GMP (SC-9.0)

Navigation Project>Contract & Procurement>Construction Agreement

Action By Project Manager (PM) / Project Coordinator (PC) / Planner

Pre-requisites Approval for an Agreement

Related Files Issuing an RFP (Release in 2020)

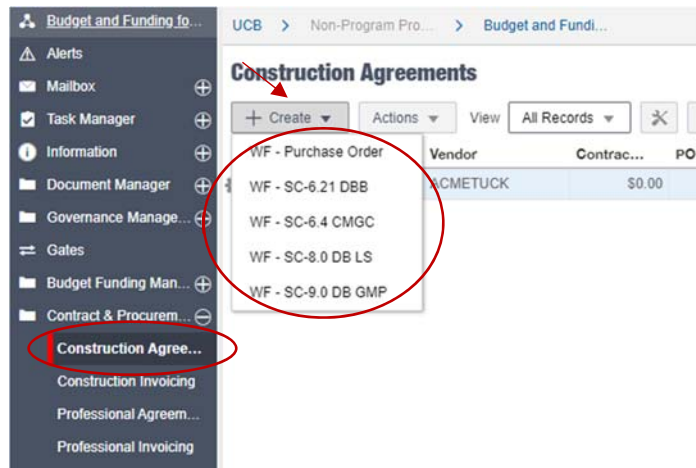
Action By: PM / PC / Planner

Example

1. **Navigate** to Contracts & Procurement>Construction Agreements in the left-hand panel. Select to open window.

Note: You should have the necessary dollars in place on the applicable line item in both the Budget and Funding Cost Code Allocation prior to initiation of the agreements.

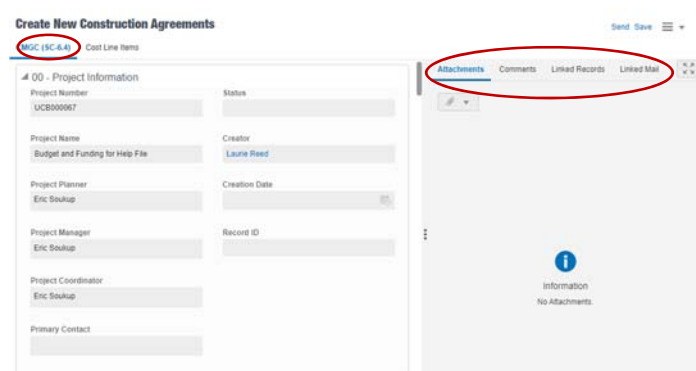
2. **Select** "Create". There are workflow (WF) options for the type of agreement you are requesting. Options will vary depending on the project delivery type established and the project phase. Choose the appropriate agreement. Each agreement has similar, but different required fields for data entry.



3. In this script we will use WF SC-6.4 CMGC. **Note** the type of agreement is shown in the top left-hand corner.

- a. Greyed fields will auto-populate as appropriate.

4. **Add** attachment, Comments, etc. using the buttons on the right-hand side.



Action By: PM / PC / Planner

Example

5. **Note** blocks 01 and 02 are consistent for all agreements, with slight field name variations accordingly.
6. **Select** the Contractor Firm name and Firm Contact Name.
 - a. Address information will auto-populate based on the Vendor chosen but remain editable.

01 - Contractor Information

Contractor Firm Name *	Firm Contact Name
<input type="text" value="Type a Vendor Name..."/>	<input type="text" value="Type a Name..."/>
Address 1 *	Firm Contact Name *
<input type="text"/>	<input type="text"/>
Address 2	Firm Contact Title *
<input type="text"/>	<input type="text"/>
Address 3	Firm Contact Email *
<input type="text"/>	<input type="text"/>
City *	
<input type="text"/>	
Zip/Postal Code *	
<input type="text"/>	
State/Province *	
<input type="text" value="Select"/>	

7. **Enter** the purpose of the contract using state form language.

02 - Purpose of Contract

Purpose of Contract *

Action By: PM / PC / Planner

Example

8. **Enter** information on compensation.
- a. “Total Fee” will auto-populate as a total of Pre-Construction Phase and Construction Phase fields.
 - b. “Total General Conditions” will auto-populate as a total of Direct Personal Expenses and Other Reimbursable General Conditions fields.
 - c. “Obligation to Pay” will auto-populate as a sum of Contract Lines (covered later)

▲ 03 - Compensation

Pre-Construction Phase Fee *	\$0.00
Construction Phase Fee *	\$0.00
Total Fee	\$0.00
Direct Personal Expenses (Not to Exceed) *	\$0.00
Other Reimbursable General Conditions *	\$0.00
Total General Conditions	\$0.00
Total Fee and General Conditions	\$0.00
Obligation to Pay (\$)	\$0.00

9. In 04 – Solicitation, **enter** the information from the original RFP.

▲ 04 - Solicitation Information

RFP Date *	MM/DD/YYYY
Date of Construction Manager's Fee Proposal *	MM/DD/YYYY
Date of Notice of Award *	MM/DD/YYYY

Action By: PM / PC / Planner

Example

10. **Enter** contract recitals.

- a. Greyed areas will auto-populate as appropriate.

11. **Note** speed type auto-populates from the first funding request but is editable.

Note: You can confirm the speedtype by looking at the funding sheet.

12. **Select** a Design firm.

▲ 05 - Contract Recitals

Speed Type *

Appropriated Funds (\$)

Fixed Limit of Construction (\$) *

Fixed Limit of Construction (written) *

Mobilization and Front End Costs (\$) *

Mobilization and Front End Costs (written) *

Design Firm Name *

Design Firm Contact Name

Design Firm Contact Title

Design Firm Contact Email

13. **Enter** data for red asterisked fields for the Condition Precedent Clause.

Note that selecting this automatically strikes the information in the state form printed.

14. **Indicate** which phases are included by typing "Yes" and selecting the option that appears.

▲ 06 - Condition Precedent Clause

Condition Precedent Clause *

Funding Appropriated By

▲ 07 - Work Included

Pre-Construction Phase Included

Construction Phase Included

Reimbursables Included (CMGC)

Action By: PM / PC / Planner

Example

15. Indicate which phases are excluded by typing “Yes” and selecting the option that appears.

Note: See steps 15 and 17 in Section 3.3.5 in how to make selections.

16. Enter the number of bid packages included:

- a. No of Bid Packages (#): Write this as a numeric value e.g. “4”.
- b. No of Bid Packages (written): Spell out the number above e.g. “four”.

17. Enter data for red asterisked fields.

18. Note fields are auto populated by default but are editable.

19. Enter data for red asterisked fields. Fields are auto populated by default but are editable.

Note: At this point, do NOT add cost line items since they will be added automatically for all forms except Design Bid Build.

Note: If this is a Design Bid Build (SC-6.21) form, skip this workflow step and start adding Cost Line Items on Step 24.

08 - Work Excluded

Pre-Construction Phase Excluded
Type a Constant... ▼

Construction Phase Excluded
Type a Constant... ▼

Reimbursables Excluded (CMGC)
Type a Constant... ▼

09 - The Work

No. of Bid Packages (#) *

No. of Bid Packages (written) *

10 - Other Provisions

Additional Tax Exemptions

Liquidated Damages (written) *

Davis-Bacon Act Application

Liquidated Damages (\$) *

Related Damages (written) *

Related Damages (\$) *

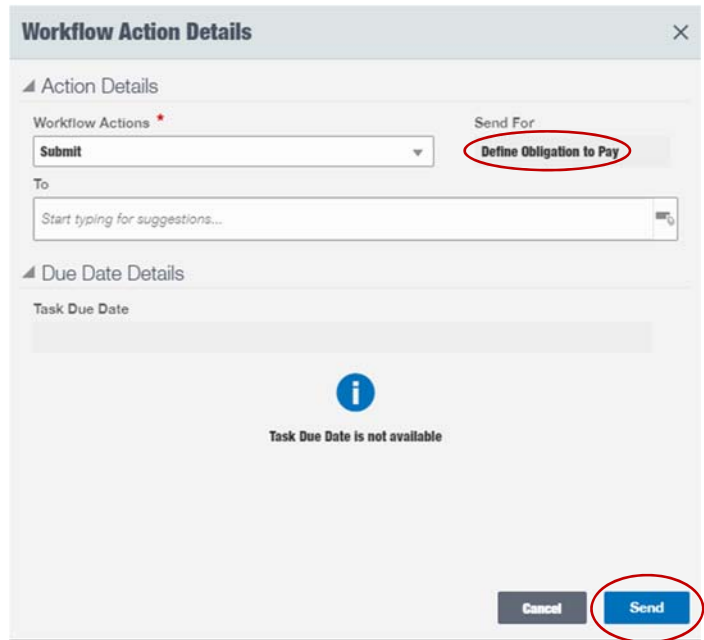
11 - Principal Representative

Principal Representative *

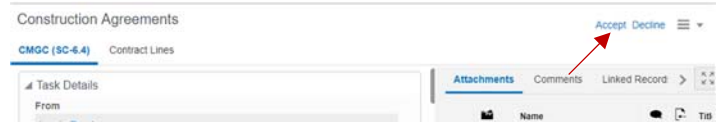
Action By: PM / PC / Planner

Example

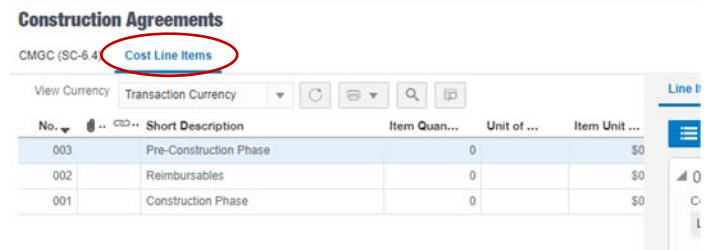
20. **Select** “Send” to open the Workflow Action Details screen.
21. **Note** in this step “Submit” is the only option and is pre-selected.
22. **Select** the Recipient(s) in the “To” field.
23. **Select** “Send” to send for Define Obligation to Pay (CMGC / Design Bid Build / Design Build - GMP/ Design Build - LS)



24. **Locate** the Task, open the record and Accept.



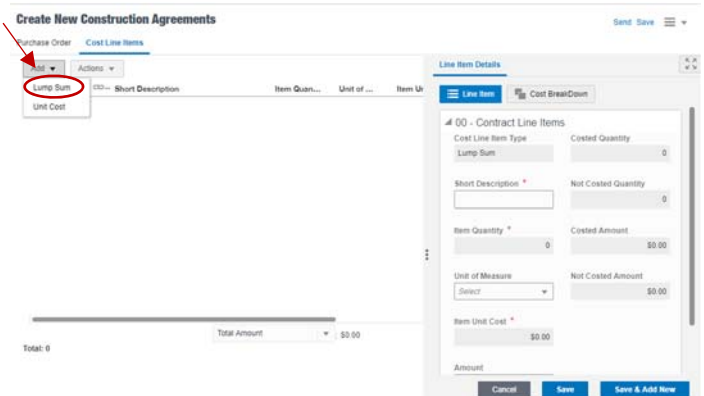
25. **Access** “Cost Line Items” at the top of the window.



Note: All phases indicated as work included will appear in the Cost Line Items tab in agreements where there is work included/excluded.

Note: The reason for line items and line item cost breakdown is to capture the contractor’s schedule of values (SOV) detail against the contract value line item.

26. In agreements where Cost Line Items do not auto-populate, **select** “Add”, then “Lump Sum”.



- a. Line Item Details window will open.

27. **Note** that we will first enter the summary and then allocate it to more detail at the CBS level.

Action By: PM / PC / Planner

Example

28. For each line item, **enter** the Amount.

- a. You can cancel the entry by clicking Cancel at the bottom of the page.
- b. Do NOT select Save or Save & Add New at this point. It will give you an error message until you enter a Cost Breakdown for the Line.

Note: Ignore the Unit of Measure field – it is not used in most cases.

29. **Access** Cost Breakdown at the top of the page

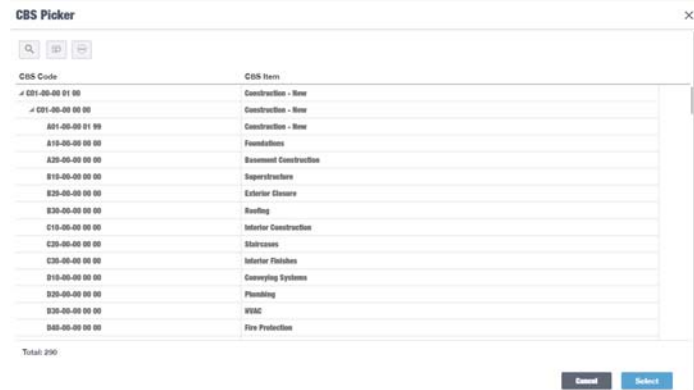
30. **Select** the “+” symbol to open the CBS Picker.

No.	Cost Code *	Cost Name	Short Description *	Amount
001	C03-00-00 10 01	Construction Fee	Construction Phase	1,000.00

Action By: PM / PC / Planner

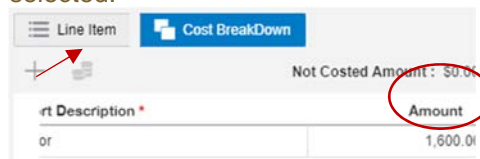
Example

31. **Select** a CBS code.



32. **Double-click** on “Amount” and enter the amount. Note: more than one Cost Code may be assigned to a single Line Item.

Note: If you are assigning the entire amount of the Line Item, you can select the coins symbol. The CBS Picker will appear, and the amount of the Line Item will auto-populate the “Amount” field of the CBS code selected.



a. “Not Costed Amount” must equal 0.00

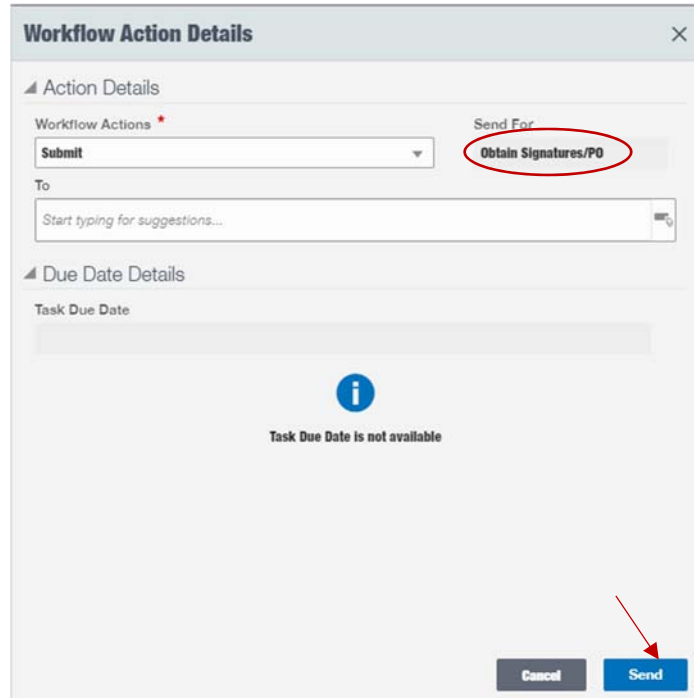
33. **Select** “Save” to save the Cost Breakdown to the Line entry

a. Optionally, **select** “Cancel” to cancel the entire Contract Line entry.

Action By: PM / PC / Planner

Example

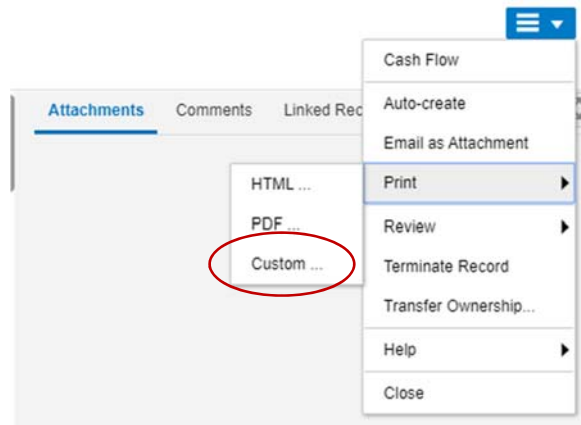
34. **Select** “Send” to open the Workflow Action Details screen.
35. **Note** in this step Submit is the only option and is pre-selected.
36. **Select** the Recipient(s) in the “To” field.
37. **Select** “Send” to send for Obtain Signatures/PO to your PC.



38. Recipient **locates, opens** and **accepts** the task.

Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.

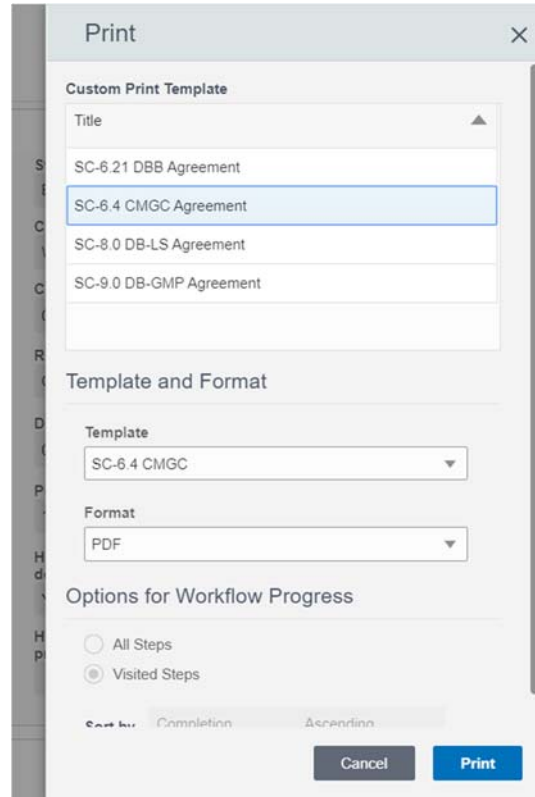
39. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom....



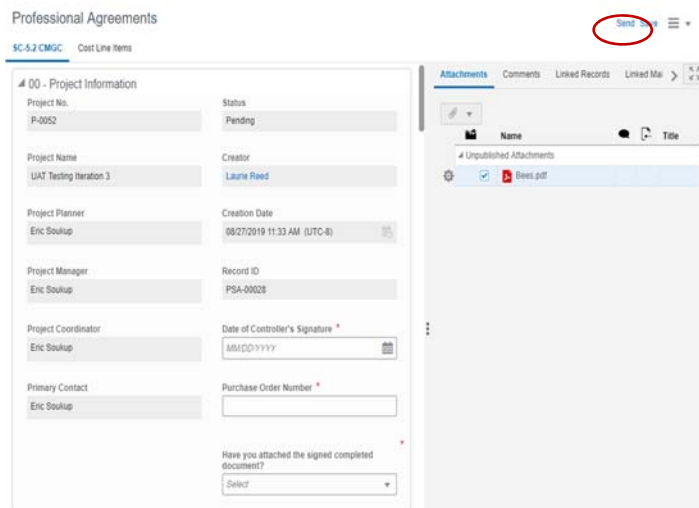
Action By: PM / PC / Planner

Example

- 40. **Select** “SC-6.4” to highlight the correct output.
- 41. **Ensure** the format is PDF.
- 42. **Select** “Print” to generate the PDF.
- 43. **Save** the PDF for upload into DocuSign.



- 44. **Route** agreement through DocuSign with applicable attachments and routing document.
- 45. Upon executed agreement, **request** PO from Marketplace.
- 46. **Wait** until all signatures are obtained and the PO is received.
- 47. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 48. **Enter** remaining data for red asterisked fields.
- 49. **Attach** executed agreement and Purchase Order.
- 50. **Select** “Send” to open the Workflow Actions Detail screen. .



Action By: PM / PC / Planner

Example

- 51. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 52. **Enter** remaining data for red asterisked fields.
- 53. **Attach** executed agreement and Purchase Order.
- 54. **Select** “Send” to open the Workflow Actions Detail screen. .

Construction Agreements Send Save

CMGC (SC-6.4) Contract Lines

00 - Project Information

Project No.	P-0052	Status	Pending
Project Name	UAT Testing Iteration 3	Creator	Laurie Reed
Project Planner	Eric Soukup	Creation Date	07/03/2019 10:13 AM (UTC-8)
Project Manager	Eric Soukup	Record ID	CON-00009
Project Coordinator	Eric Soukup	Date of Controller's Signature *	MM/DD/YYYY
Primary Contact	Eric Soukup	Purchase Order Number *	

Have you attached the signed completed document?
Select

Attachments Comments Linked Record

Unpublished Attachments

Name
files.pdf

Total: 1

- 55. **Select** “Request SOV” to indicate that the contract is approved and creates a task for the Contractor to provide a schedule of values (SOV).
 - a. Optionally, **select** “Decline” to send the Business Process to the Creator for revision. Best practice is to add Comments for the reason to Decline. This workflow will have a User select “To” field.
- 56. **Select** “Send”

Workflow Action Details

Action Details

Workflow Actions * Send For

Select

Request SOV

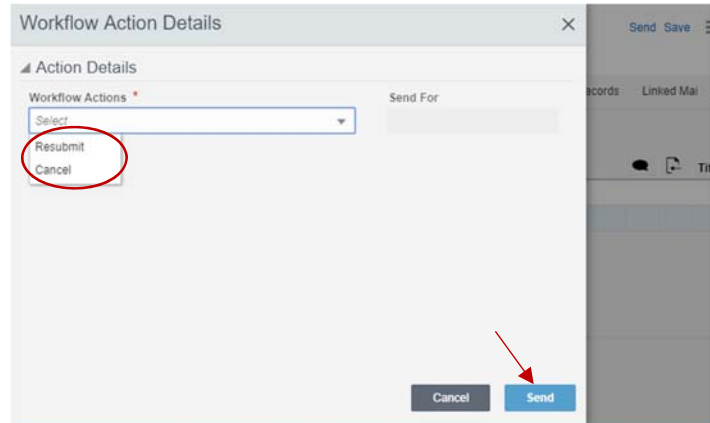
Decline

Cancel Send

Action By: PM / PC / Planner

Example

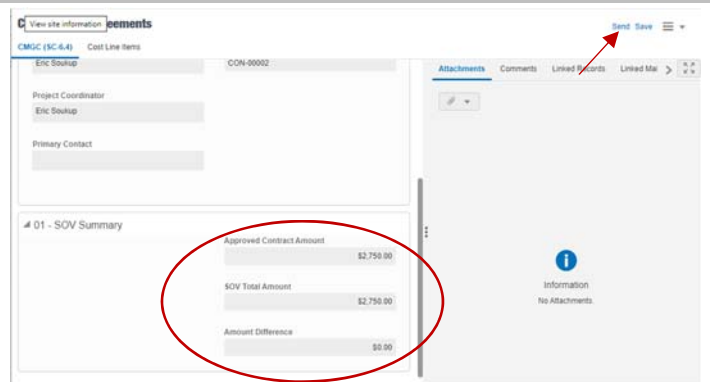
57. If “Decline” was selected, Creator locates and Accepts the task.
 - a. Reviews Comments provided and makes corrections as requested.
 - b. Open Workflow Actions by clicking Send in the upper right-hand corner
 - c. In this step the Creator has two Workflow options.
 - d. Choosing Resubmit resends the Business Process to the Obtain Signatures/PO step.
 - e. Choosing Cancel is a terminal step for the Business Process.
 - f. Both Workflows will have a User select “To” field.



Action By: Contractor

Example

58. If “Request SOV” was selected, Contractor locates and accepts the task.
59. **Select** “Cost Line Items” to view the SOV.
60. **Note** validation exists such that the Obligation to Pay cannot change during this process.



Action By: Contractor

Example

61. For each line item, **view** the Amount.

Note: Ignore the Unit of Measure field – it is not used in most cases.

62. **Access** Cost Breakdown at the top of the page and view the draft breakdown.

63. **Highlight** an item that need to be further broken down or changed.

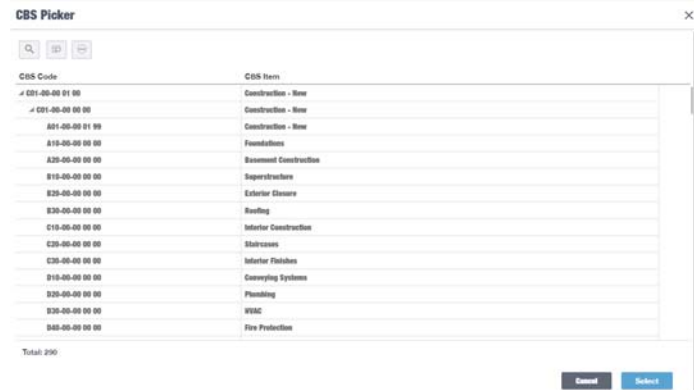
64. **Select** the “+” symbol to open the CBS Picker.

No.	Cost Code *	Cost Name	Short Description *	Amount
001	C03-00-00 10 01	Construction Fee	Construction Phase	1,000.00

Action By: Contractor

Example

65. **Select** a new CBS code.



66. **Double-click** on “Amount” and enter the amount.

Note: more than one Cost Code may be assigned to a single Line Item.

- a. “Not Costed Amount” must equal 0.00



67. **Select** “Save” to save the Cost Breakdown to the Line entry

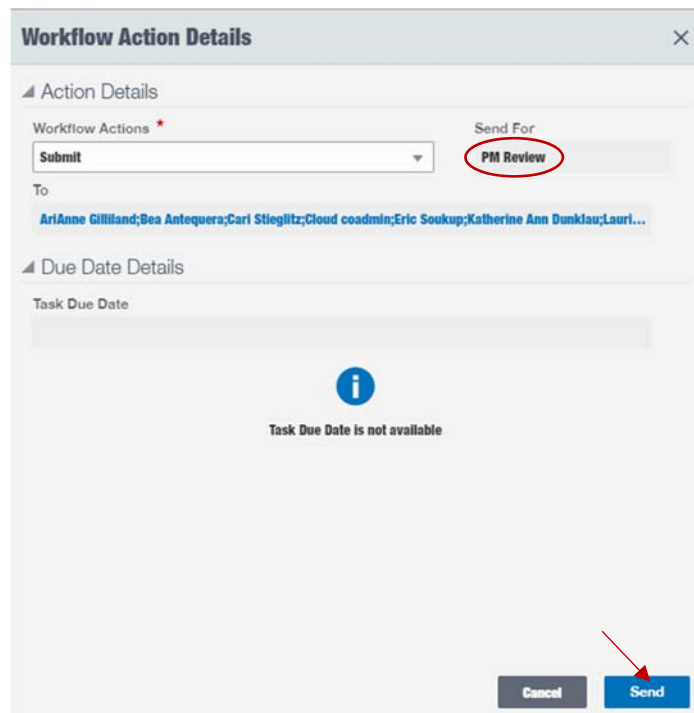
68. Repeat above until all line items are allocated to how they should be tracked in the SOV.

69. **Select** “Send” to open the Workflow Action Details screen.

70. **Note** in this step Submit is the only option and is pre-selected.

71. **Note** the “To” field is Preassigned.

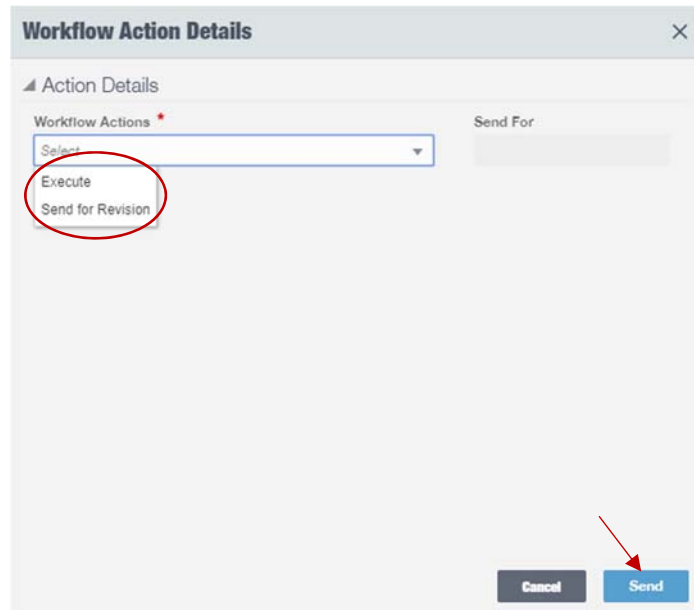
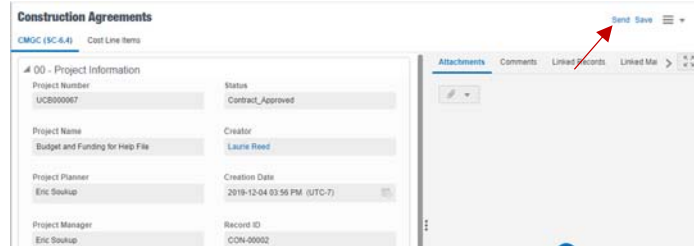
72. **Select** “Send” to send for PM Review



Action By: PM / PC / Planner

Example

- 73. PM **locates** and accepts the task.
- 74. **Validate** the SOV has been provided.
 - a. If there is a need for clarification or revision, the PM may indicate as such using General Comments and return the record to the Contractor.
- 75. **Select** “Send” to open the Workflow Action Details screen.
- 76. **Select** “Execute” to send an email notification to the Vendor and any others CC’d. Note this is a terminal step for the Business Process.
 - a. Optionally, select “Send for Revision” to send the Business Process to the Contractor for revision. Best practice is to add Comments for the reason to Revise.
- 77. **Select** “Send”.



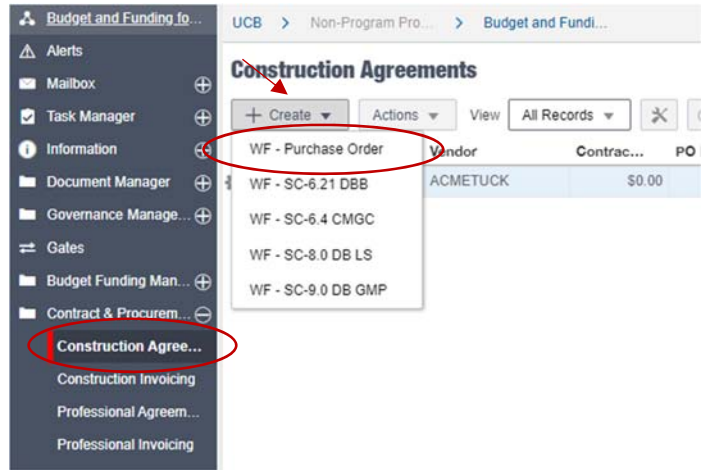
END TASK

3.3.11 CREATING A CONSTRUCTION PO AGREEMENT (UPDATED 03/11/2020)

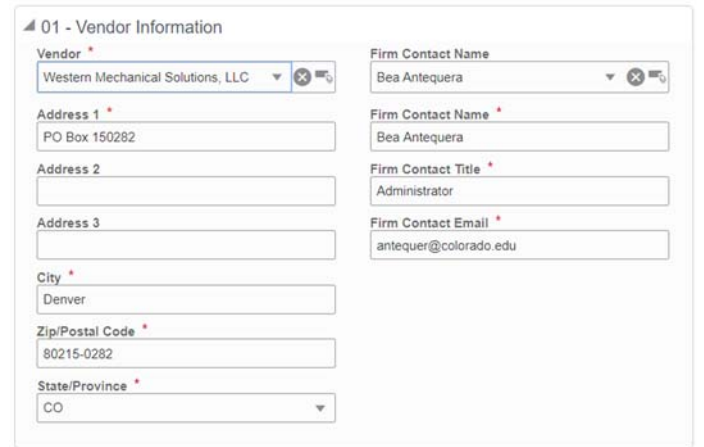
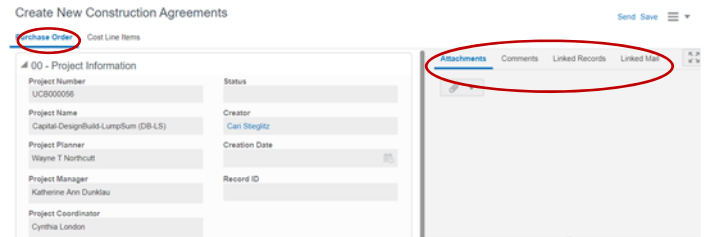
- Goals** How to award a procurement and create a PO for construction.
- Navigation** Project>Contract & Procurement>Construction Agreement
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Approval for an Agreement. PO from marketplace.
- Related Files** Issuing an RFP (Release in 2020)

Action By: PM / PC / Planner **Example**

1. **Navigate** to Contracts & Procurement>Construction Agreements in the left-hand panel. Select to open window.
 2. **Select** “Create” and select the “WF – Purchase Order” workflow.
- Note: The PO needs to be obtained in MarketPlace prior to starting.



3. Note the type of agreement is shown in the top left-hand corner.
4. Greyed fields will auto-populate as appropriate.
5. Add attachment, comments, etc. using the buttons on the right-hand side.
6. **Select** the Vendor and Firm Contact Name.
 - a. Address information will auto-populate based on the Vendor chosen but remain editable.



Action By: PM / PC / Planner

Example

7. **Enter** the purpose of the PO.

8. **Enter** data for red asterisked fields.

- a. "PO Amount" will auto-populate as a sum of Contract Lines in next step.

9. **Select** "Cost Line Items" at the top of the screen to access the contract line items.

10. **Select** "Add", then "Lump Sum".

- a. Line Item Details window will open.

Note: We will first enter the summary to match the PO from MarketPlace and then allocate it to more detail at the CBS level.

11. For each line item, **enter** the Amount.

- a. You can cancel the entry by clicking Cancel at the bottom of the page.
- b. Do NOT select Save or Save & Add New at this point. It will give you an error message until you enter a Cost Breakdown for the Line.

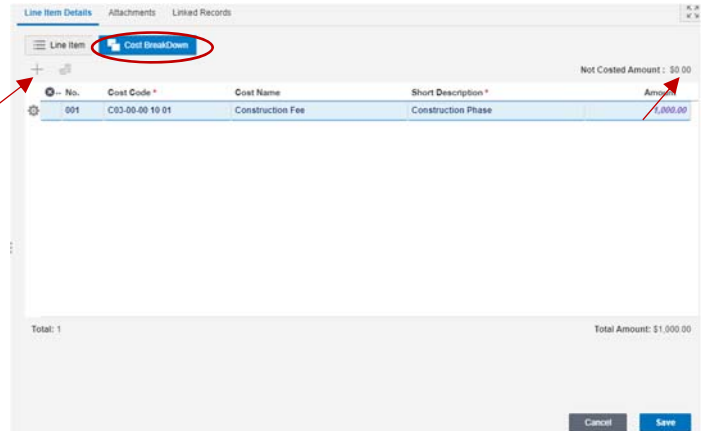
Note: Ignore the Unit of Measure field – it is not used in most cases.

Action By: PM / PC / Planner

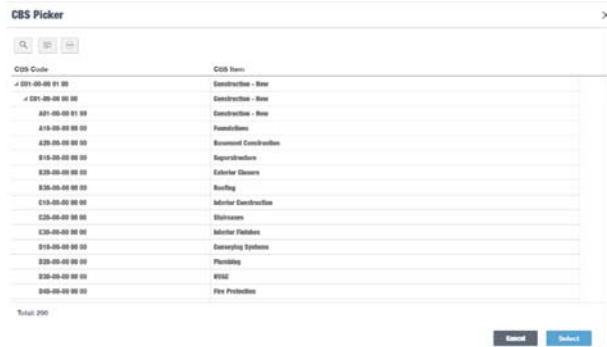
Example

12. **Access** Cost Breakdown at the top of the page

13. **Select** the “+” symbol to open the CBS Picker.

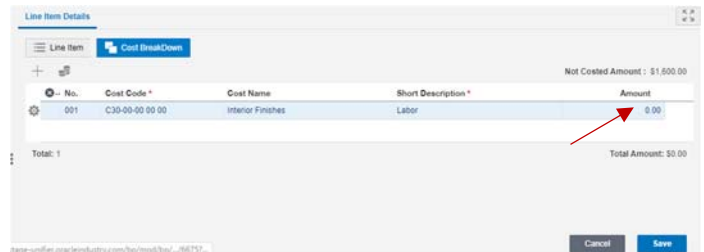


14. **Select** a CBS code.



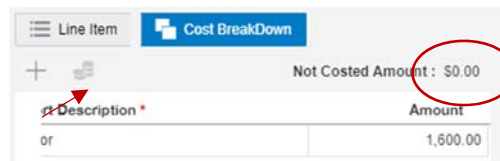
15. **Double-click** on “Amount” and enter the amount.

Note: more than one Cost Code may be assigned to a single Line Item.



16. If you are assigning the entire amount of the Line Item, **select** the coins symbol.

- a. The CBS Picker will appear, and the amount of the Line Item will auto-populate the “Amount” field of the CBS code selected.
- a. “Not Costed Amount” must equal 0.00



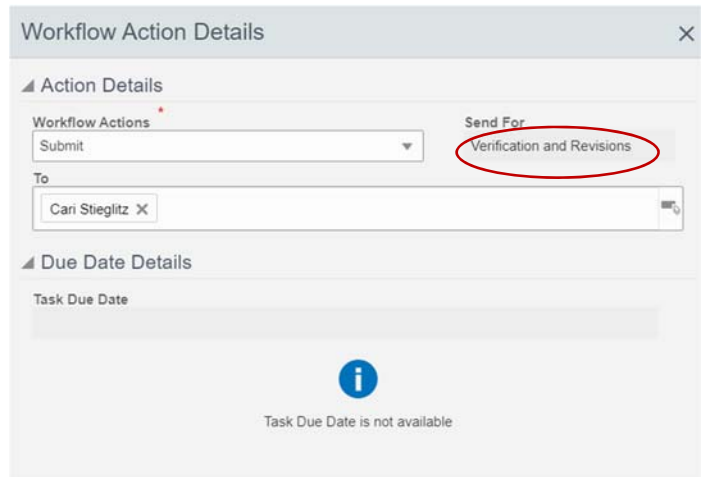
17. **Select** “Save” to save the Cost Breakdown to the Line entry

- a. Optionally, **select** “Cancel” to cancel the entire Contract Line entry.

Action By: PM / PC / Planner

Example

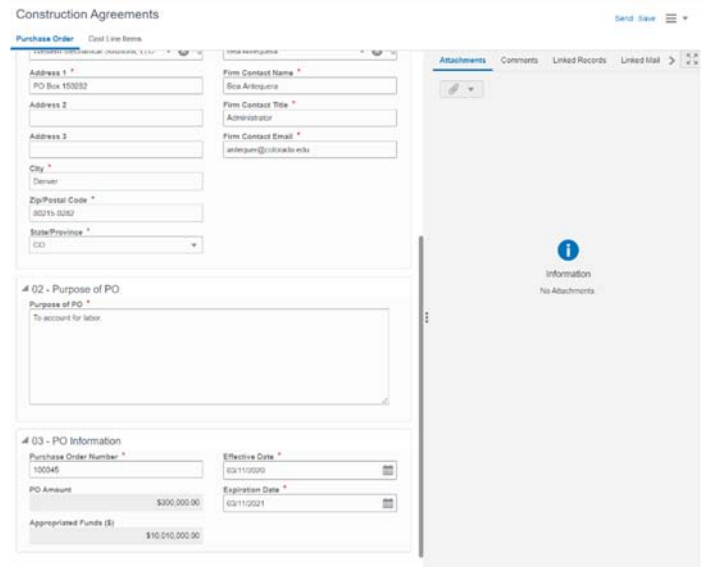
18. **Select** “Send” to open the Workflow Action Details screen.
Note: in this step “Submit” is the only option and is pre-selected.
19. **Select** the Recipient(s) in the “To” field.
20. **Select** “Send” to send for Verification and Revisions.



21. **Locate** the task, open the record and accept.



22. **Review** the PO information entered.

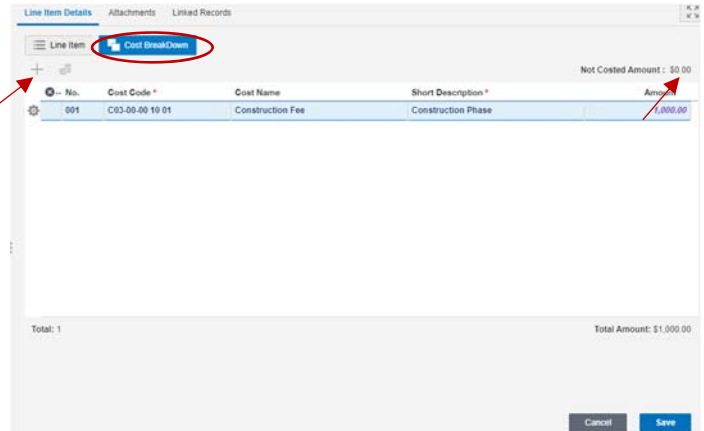


Action By: PM / PC / Planner

Example

23. **Access** Cost Breakdown at the top of the page

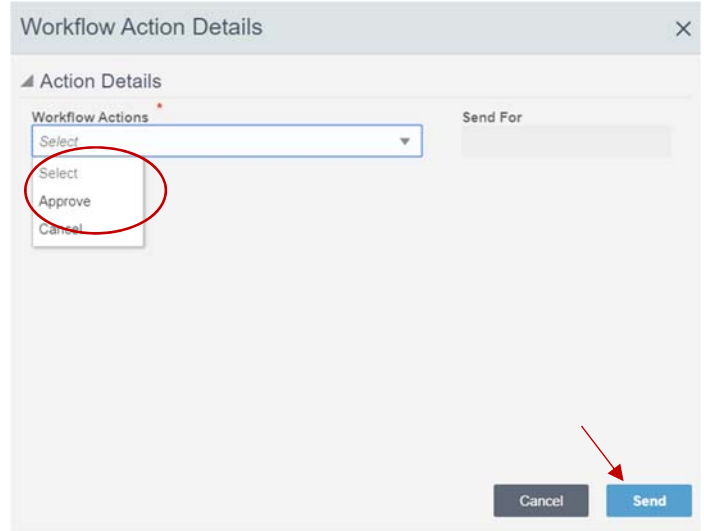
24. **Validate** the line item and breakdown are correct.



25. **Select** "Approve" to save the PO and establish the SOV.

a. Optionally, **select** "Cancel" to cancel the entire PO.

26. **Select** "Send".



END TASK

3.3.12 ISSUING A NOTICE TO PROCEED (NTP) (UPDATED 4/14/2020)

Goals How to issue a Notice to Proceed (NTP) including the generation of state forms.

Navigation Project>Contract & Procurement>Notice to Proceed

Action By Project Manager (PM) / Project Coordinator (PC) / Planner

Pre-requisites Construction Agreement or Amendment

Related Files None

Action By: PM / PC / Planner **Example**

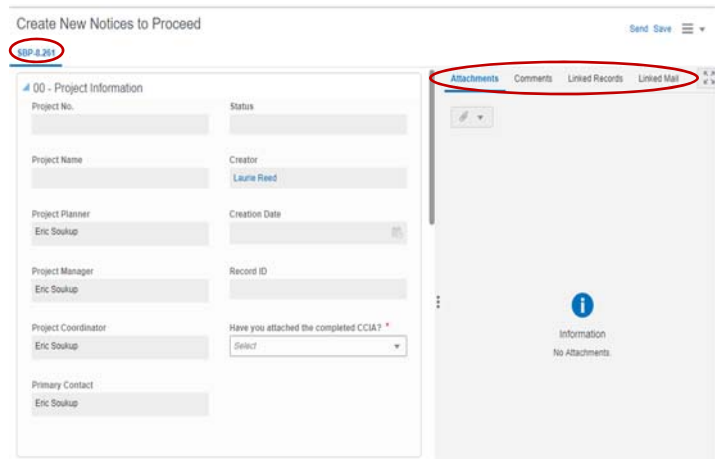
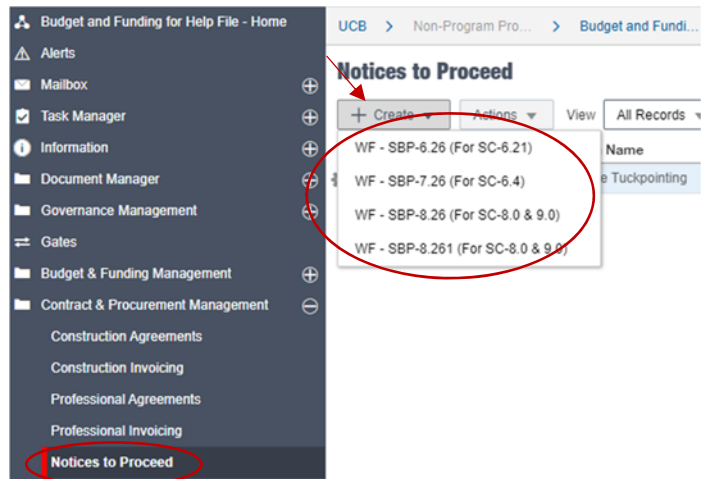
1. **Navigate** to Notices to Proceed (NTP) in the left-hand panel. Select to open window
2. **Select** “Create” and choose the appropriate Workflow. There are workflow (WF) options for each type of agreement. Choose the appropriate agreement. Each NTP has similar but different required fields for data entry.

Note: Create options are limited to the delivery type template shell.

Note: SBP-8.26 is a Notice to Proceed with Design, and the SBP-8.261 is a Notice to proceed with Construction in a Design/Build delivery type.

Note: In this script we will use WF SBP-8.261 (For SC-8.0 & 9.0) for Contractors. Note the type of NTP is shown in the top left-hand corner.

3. **Enter** data for red asterisked fields
 - a. Greyed fields will auto-populate as appropriate.
4. **Add** Attachment, Comments, etc. using the buttons on the right-hand side.



Action By: PM / PC / Planner

Example

- Select** if this is related to a contract or amendment.

Note: The contract or amendment reference changes based on the selection.

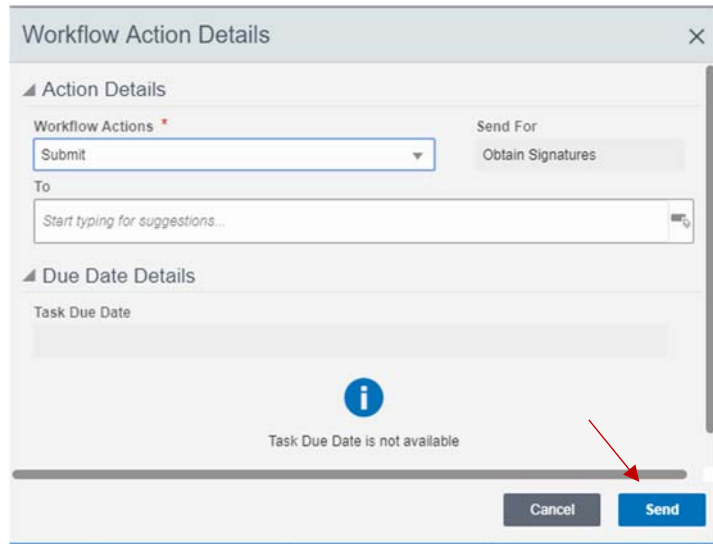
- Select** the related contract or amendment reference.
 - Greyed fields will auto-populate as appropriate.

- Select** the date of the notice to proceed to reflect the NTP start date.
- Select** all the Construction Phases this NTP impacts.
- Enter** the description of work that should appear on the NTP state form.
- Select** the expected date of substantial completion.
- Select** "Send" to open the Workflow Action Details screen.
 - Optionally, **select** "Save" to save as a draft and complete later.

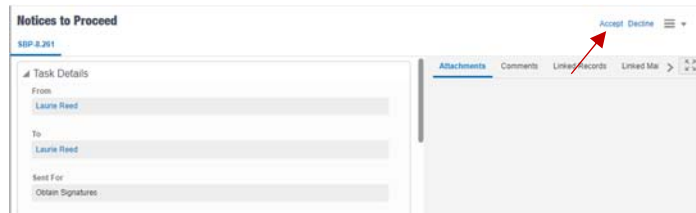
Action By: PM / PC / Planner

Example

12. **Note** in this step “Submit” is the only option and is pre-selected.
13. **Select** the Recipient(s) in the “To” field.
14. **Select** “Send” to send for Obtain Signatures

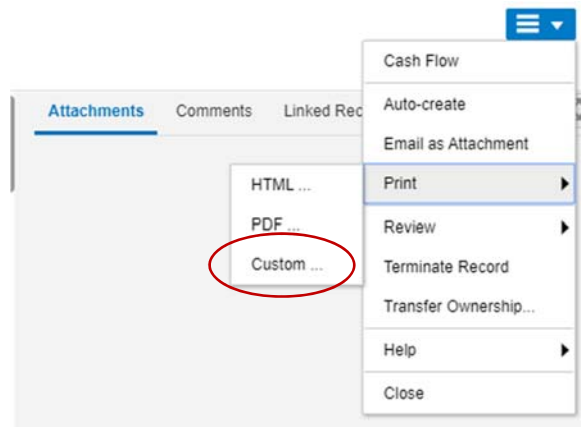


15. Recipient **locates** their Task and **opens** the record
16. **Select** “Accept” to enable the record for editing.



17. Recipient **locates, opens** and **accepts** the task.
- Note: In this step the PC will obtain signatures outside of Unifier and upload the executed NTP to Unifier.

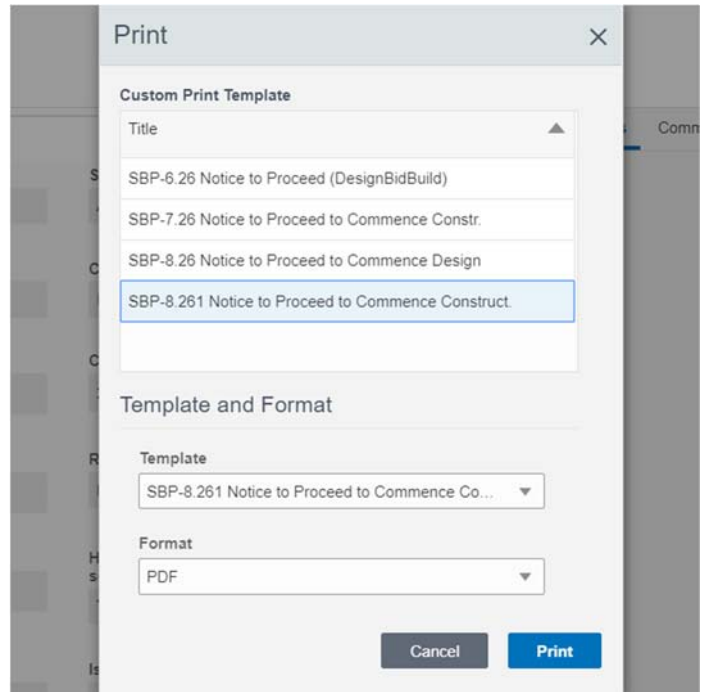
18. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom....



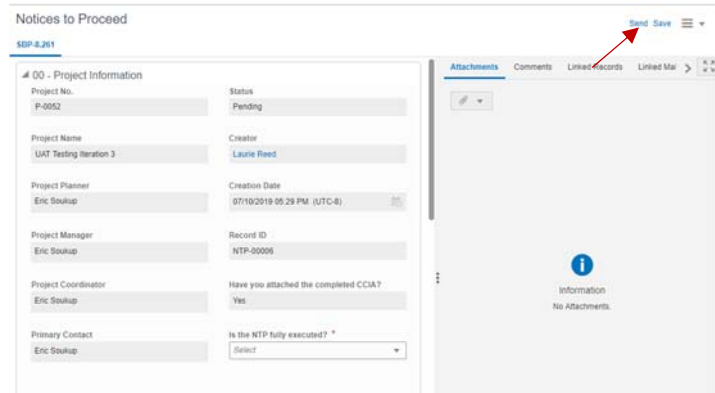
Action By: PM / PC / Planner

Example

19. **Select** “SBP-8.261” to highlight the correct output.
20. **Ensure** the format is PDF.
21. **Select** “Print” to generate the PDF.
22. **Save** the PDF for upload into DocuSign.



23. **Route** agreement through DocuSign with applicable attachments and routing document.
24. **Wait** until all signatures are obtained.
25. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
26. **Enter** remaining data for red asterisked fields.
27. **Select** “Send” to open the Workflow Actions Detail screen.



Action By: PM / PC / Planner

Example

28. **Select** “Approve” to send an email notification is sent to the Vendor and any others CC’d. **Note** this is a terminal step for the Business Process.

- a. Optionally, **select** “Decline” to send the Business Process to the Creator for revision. Best practice is to add Comments for the reason to Decline.
- b. Decline will have a User select “To” field.

29. **Select** “Send”.

30. If the record was declined, Recipient **locates, opens** the record, and **Accepts** the task.

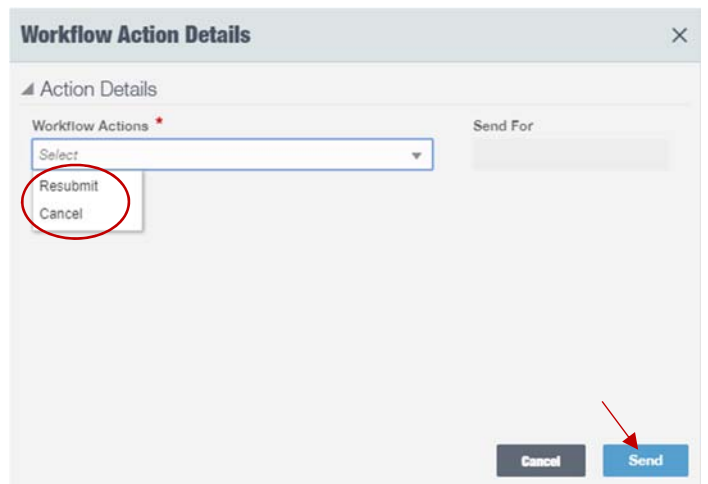
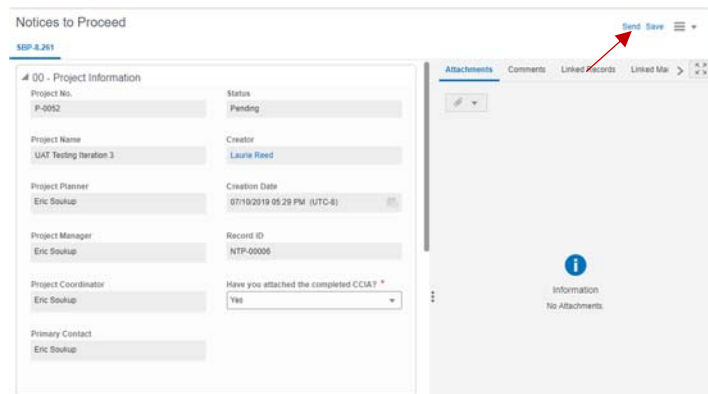
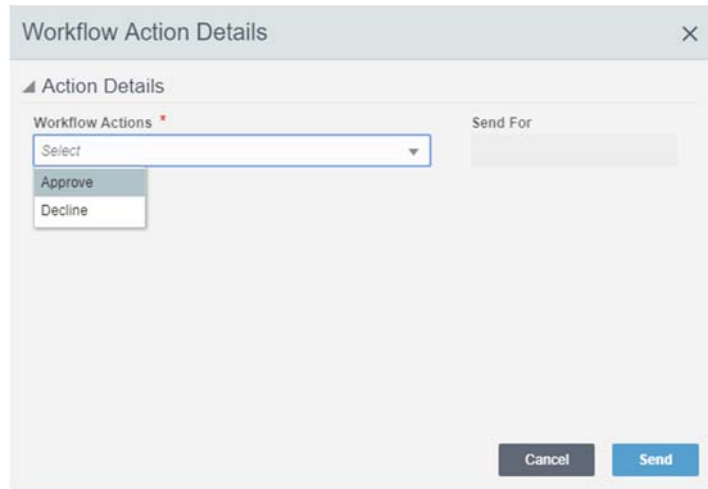
31. **Reviews** Comments provided and makes corrections as requested.

32. **Select** Send to open Workflow Actions

33. In this step the Recipient has two Workflow options.

- a. Resubmit resends the Business Process to the Obtain Signatures for update step.
- b. Cancel is a terminal step for the Business Process.
- c. Resubmit will have a User select “To” field.

34. **Select** “Send”.



END TASK

3.3.13 INVOICING A CONSTRUCTION AGREEMENT (UPDATED 4/14/2020)

Goals How to initiate a pay application against a construction agreement, including generating state forms.

Navigation Project>Contract and Procurement>Construction Invoicing

Action By Project Manager (PM), Project Coordinator (PC) or Planner

Pre-requisites Construction Agreement, Contractor SBP-7.2 or Invoice

Related Files

Action By: PM / PC / Planner

Example

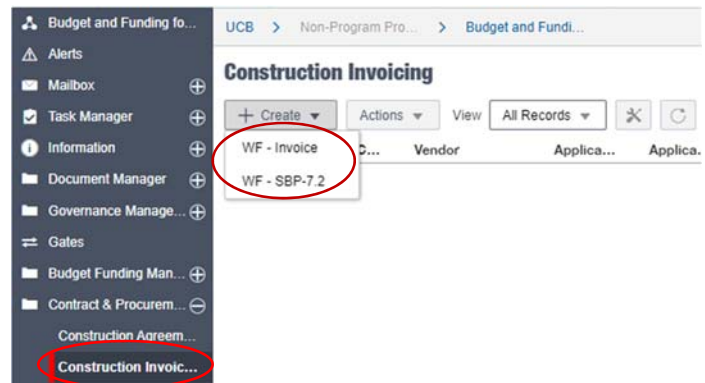
1. **Navigate** to Project>Contract & Procurement Management>Construction Invoicing.

2. **Select** "Create".

Note: Use WF – Invoice when you have a PO and retainage will not be held. Demonstration of submitting an Invoice follows SBP-7.2.

Note: Use WF – SBP-7.2 when retainage will be held, and the Contractor will be submitting progress payments.

Note: The WF steps are the same for both, but the required fields for submission will vary. This file demonstrates WF – SBP-7.2.

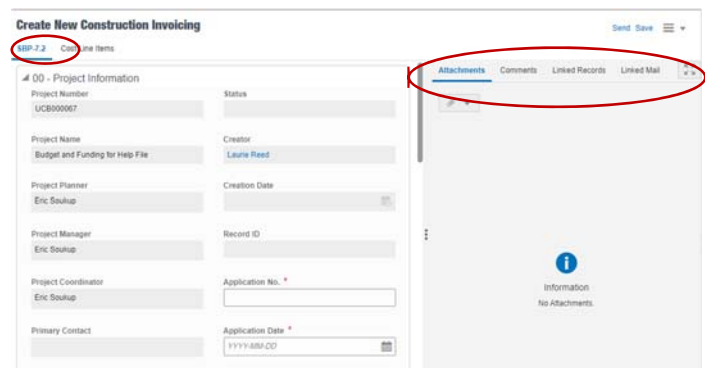


3. In 00-Project Information, **enter** data for red asterisked fields (required).

- a. Greyed fields will auto-populate when a Contract/PO reference is selected

4. **Add** attachment, Comments, etc. using the buttons on the right-hand side.

Note: attach contractor's invoice and pay application supporting documentation.



Action By: PM / PC / Planner

Example

5. In 01 - Application Information, **select** the original contract.
6. **Enter** the period from and to for the period in which the invoice covers.
7. **Enter** the Vendor's invoice number.
 - a. Greyed fields will auto-populate as appropriate.

8. In 02 - Application Amount, **note** greyed fields on the right-hand side are sum formulas based on current plus all past invoices.

01 - Application Information

Original Contract *	Period From *
<input type="text" value="Type a Record ID..."/>	<input type="text" value="YYYY-MM-DD"/>
Contractor Firm Name	Period To *
<input type="text"/>	<input type="text" value="YYYY-MM-DD"/>
PO Number	
<input type="text"/>	
Invoice No. *	
<input type="text"/>	

02 - Application Amount

Original Obligation to Pay (\$)	\$0.00	Total Amount Earned	\$0.00
Net Changes by Amendments	\$0.00	Total Retainage	\$0.00
Present Contract Total	\$0.00	Total Earned Less Retainage	\$0.00
		Prior Amount Earned	\$0.00
		Prior Retainage	\$0.00
		Prior Amount Earned Less Retainage	\$0.00
		Amount Earned This Period	\$0.00
		Retainage (This Period)	\$0.00
		Payment This Period Less Retainage	\$0.00

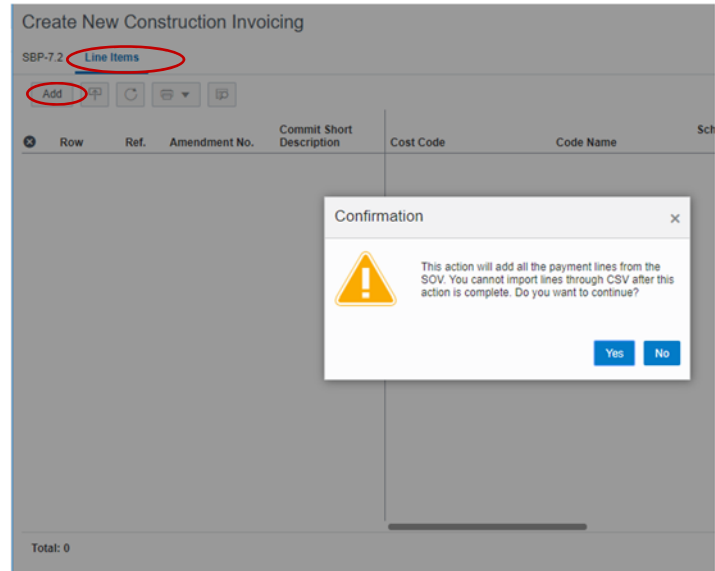
Action By: PM / PC / Planner

Example

9. **Access** “Line Items” at the top of the page.
10. **Select** “Add” to display this message.
11. **Select** “Yes” to load the SOV (Schedule of Values) for the contract

Note: Approved line items from Agreement plus approved Agreement Modifications will auto-populate.

Note: Retainage can be changed e.g. reduced from 5% to 0% in the case of AE fees or a final pay application.



12. **Enter** Total Completed to Date values based on Vendor’s application form SBP-7.1

Note the error icon if the Earned to Date value entered exceeds Scheduled Value.

Note: Error Check will alert you to errors as well.

Row	Ref.	Amendment No.	Commit Short Description	Scheduled Value	Total Completed to Date	Previously Completed to Date	Percentage Complete to Date	Requested This Period
001	1		Pre-Construction	\$1,000.00	\$1,500.00	\$0.00	0	\$1,500.00
002	1.1		Pre-Construction	\$1,000.00	\$1,500.00	\$0.00	0	\$1,500.00
003	2		Reimbursables	\$750.00	\$200.00	\$0.00	0	\$200.00
004	2.1		Reimbursables	\$750.00	\$200.00	\$0.00	0	\$200.00
005	3		Construction Phase	\$1,000.00	\$800.00	\$0.00	0	\$800.00
006	3.1		Construction Phase	\$1,000.00	\$800.00	\$0.00	0	\$800.00
TOTAL				\$2,750.00	\$2,500.00	\$0.00	0	\$2,500.00

13. **Select** “Save” to save current entry.

14. **Select** “Send” to open the Workflow Action Details screen.

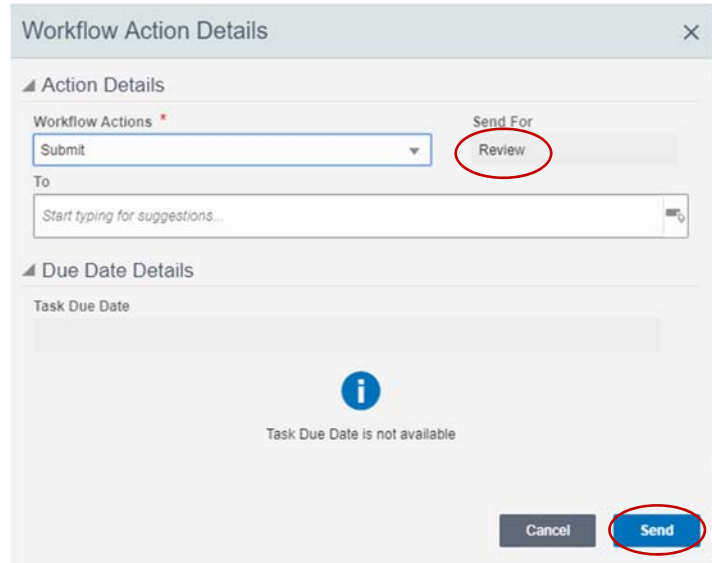
- a. Optionally, **select** Save to save as a draft and complete later.



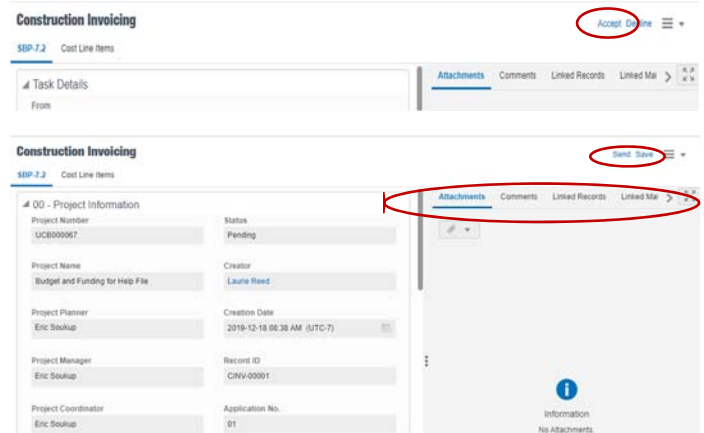
Action By: PM / PC / Planner

Example

15. **Note** in this step Submit is the only option and is pre-selected.
16. **Add** Recipient(s) in the “To” field.
17. **Select** “Send” to send for Review



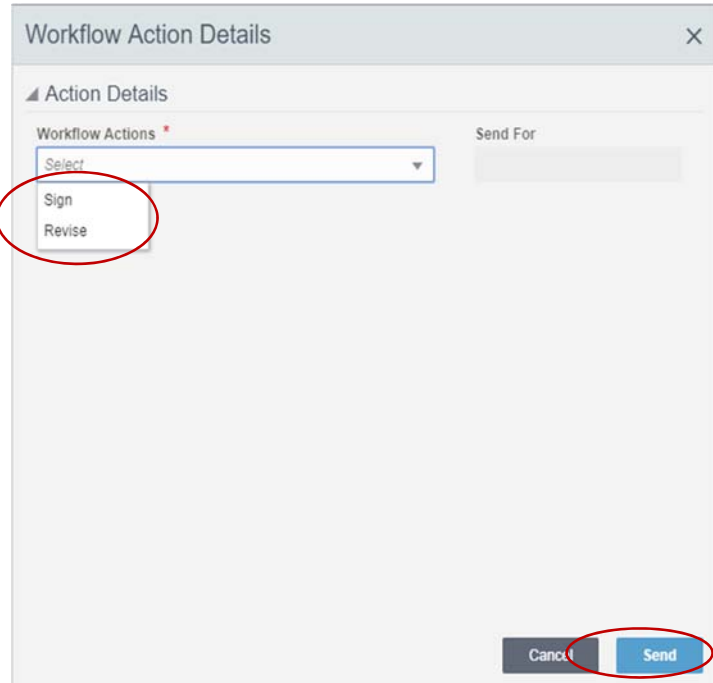
18. Recipient **locates** their Task, **opens** the record, and **Accepts** to open the record.
19. **Review** all data entry, attachments, comments, etc.
20. Attachment, Comments, etc. may be added as necessary.
21. **Select** “Send” to open the Workflow Action Details screen.



Action By: PM / PC / Planner

Example

22. **Select** “Sign” to send the Business Process for Obtain Signature.
23. Optionally, **select** “Revise” sends the Business Process for revision and resubmit. Best practice is to add Comments for the reason to Revise.
24. **Add** Recipient(s) in the “To” field.
25. **Select** “Send”.

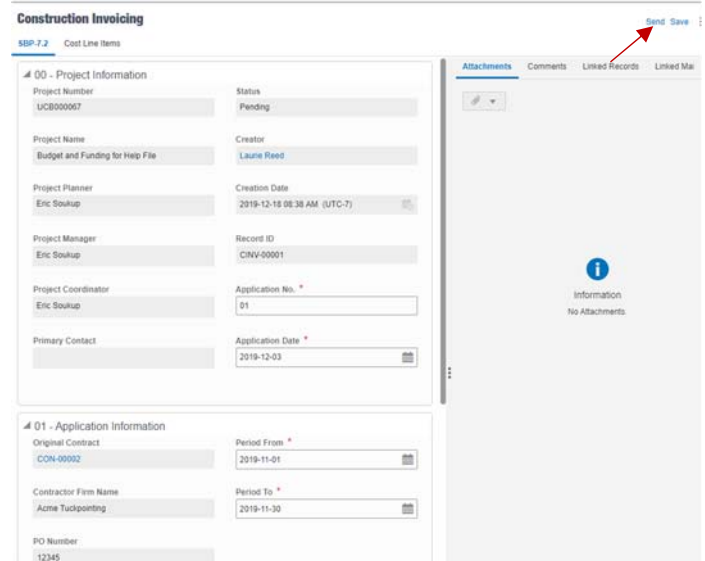


26. If Revise was selected, Creator **locates** and **Accepts** the task.
27. **Reviews** Comments provided and makes corrections as requested.

Note the red asterisk fields are editable if needed.
28. Open Workflow Actions by **selecting** Send.

In this step Resubmit is the only option.

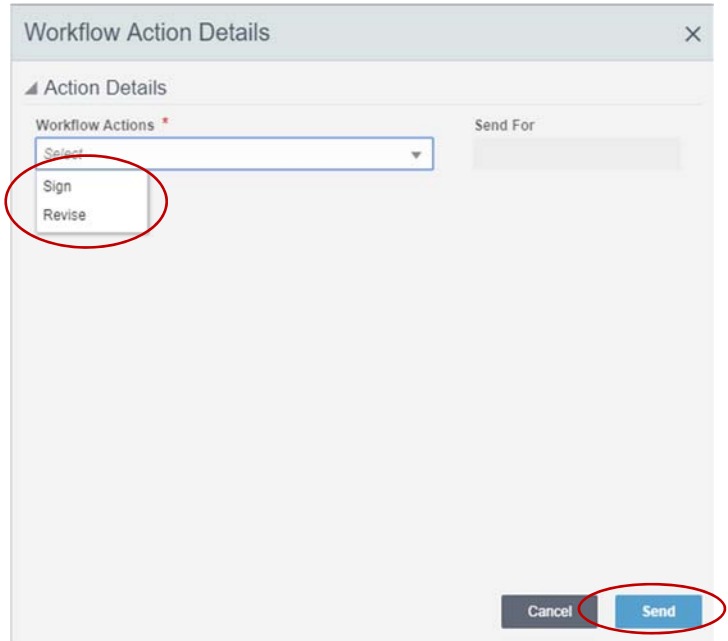
29. **Selecting** Resubmit resends the Business Process to the Reviewer and the previous workflow begins again.
30. Workflow has a User select “To” field and a Recipient(s) must be selected.



Action By: PM / PC / Planner

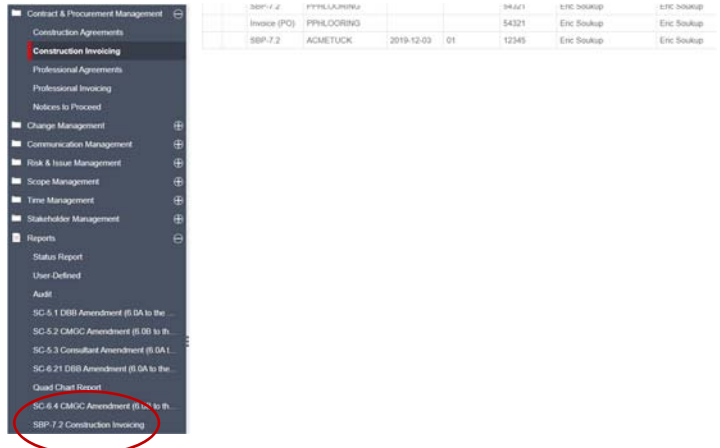
Example

31. **Select** “Sign” will send the Business Process for Obtain Signature
 - a. Optionally, **select** “Revise” to send the Business Process for revision and resubmit. Best practice is to add Comments for the reason to Revise.
32. **Add** the recipient in the “To” field.
33. **Select** “Send” to send for signature of the 7.2.



34. Recipient **locates, opens and accepts** the task.

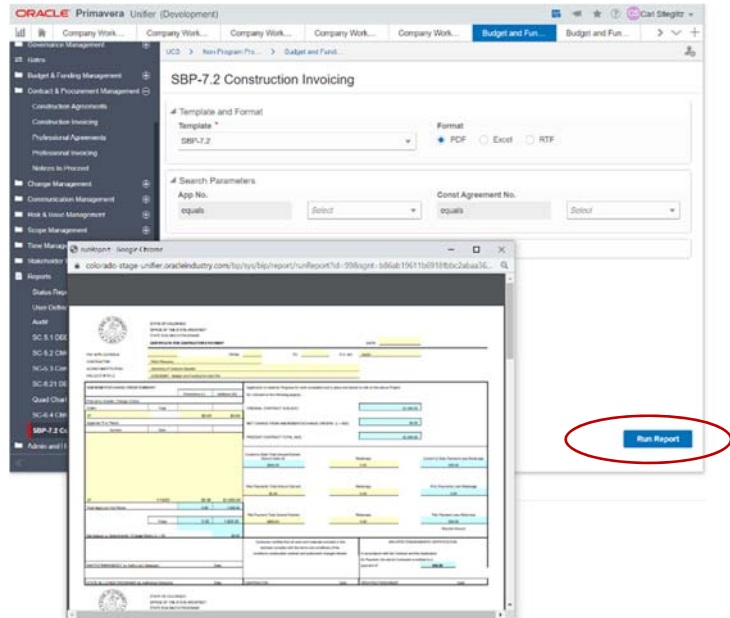
Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.
35. **Note** the Vendor and Application Number.
36. **Navigate** to Reports>SBP-7.2 Construction Invoicing and select to open the report screen.



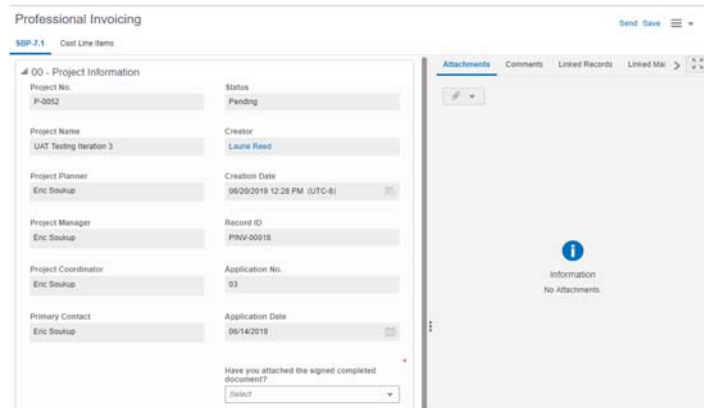
Action By: PM / PC / Planner

Example

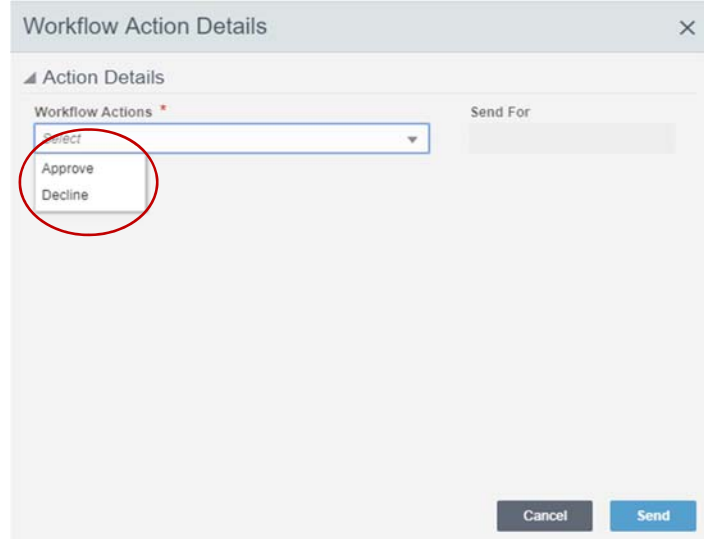
37. **Ensure** the format is PDF.
38. Under Search Parameters, **select** the App No. that was noted earlier.
39. **Select** “Run Report” to generate the PDF.
40. **Save** the PDF for upload into DocuSign.
41. **Route** agreement through DocuSign with applicable attachments and routing document.
42. **Wait** until all signatures are obtained in DocuSign.



43. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
44. **Enter** remaining data for red asterisked fields.
45. **Attach** the signed document.
46. **Select** “Send” to open the Workflow Actions Detail screen. .



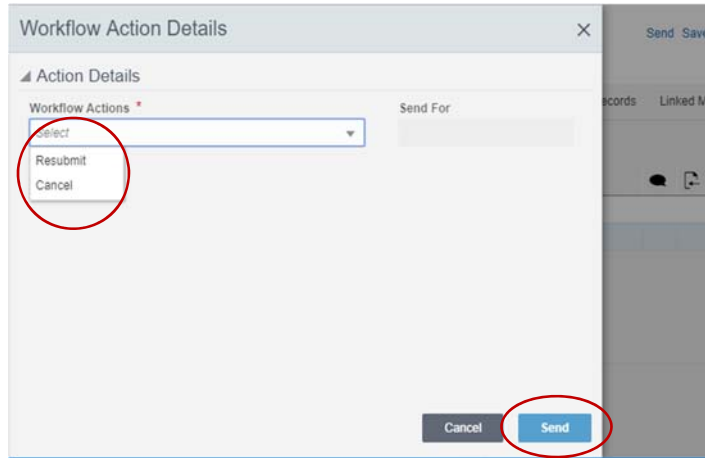
47. **Select** “Approve” to send an email notification to the Vendor. This is a terminal step for the Business Process.
 - a. Optionally, **select** “Decline” to send the Business Process for revision. Best practice is to add Comments for the reason to Decline.
48. **Select** “Send”.



Action By: PM / PC / Planner

Example

49. If “Declined” was selected, creator locates and accepts the task.
50. **Review** Comments provided and **make** corrections as requested
51. **Select** “Send” to open the Workflow Actions screen.
52. **Select** “Resubmit” to resend the Business Process to the Sign step.
 - a. Optionally, **select** “Cancel” is a terminal step for the Business Process
53. **Add** the recipient in the “To” field.
54. **Select** “Send”.



END TASK

3.3.14 VIEWING A SCHEDULE OF VALUES (SOV) (UPDATED 3/10/2020)

Goals How to view Schedule of Values (SOV) for Summary Payment Application of information and payment history from the Base / Change commits.

Navigation Project>Schedule of Values (SOV) log or from within a summary payment application record. For example, Contract & Procurement Management>Construction Agreements

Action By Project Manager / Project Coordinator / Planner

Pre-requisites None.

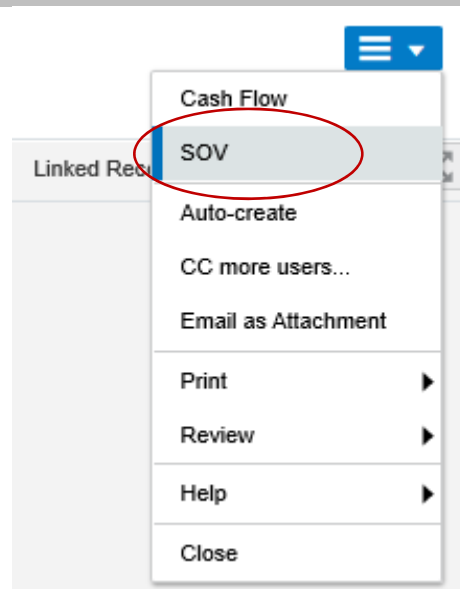
Related Files None.

Action By: Project Manager / Project Coordinator / Planner

Example

1. For this example, navigate to Projects>Contract & Procurement Management>Construction Agreements
2. **Open** a “completed” record.
3. In the upper right-hand corner pull down the contextual menu to select SOV.

Note: The record needs to have reached a specified terminal status for the SOV to be created.



4. Data displayed depends on the columns added to an SOV structure.
5. The screenshot below the SOV shows the additional columns to the right.
6. Use the toolbar to expand, collapse, find, split the screen, and export records.
7. You will notice that Schedule Value has a hyperlink, select the link to review source information.

Note: Due to the length of the SOV, the additional columns to the right are condensed in another screenshot to be legible.

Schedule of Values: Summary Payment Applications
Record: CON-00018

Item #	Ref	CBS Code	CBS Item	Cost Line Item Type	Description	Scheduled Values
000010	1			Lump Sum	Pre-Construction Phase	0.00
000020	2			Lump Sum	Construction Phase	1,000.00
000020 00010	2.1	003-00-00 20 10	Pre-Design Phase		Pre-Design Phase	1,000.00
Total:						1,000.00

Columns

Name	Data Source	Data Format	Order	Display Mode
Scheduled Value	Scheduled Value	Currency Amount	1	
Item Quantity	Item Quantity	Decimal Amount	2	
Item Unit Cost	Item Unit Cost	Currency Amount	3	
Total Previous Payments	Total Previous Payments	Currency Amount	4	
Total Completed to Date	Total Completed to Date	Currency Amount	5	
Percentage Complete to Date	Percentage Complete to Date	Decimal Amount	6	
Previous Retainage	Previous Retainage	Currency Amount	7	
Requested This Period	Requested This Period	Currency Amount	8	
Retainage (This Period)	Retainage (This Period)	Currency Amount	9	
Total Retainage	Total Retainage	Currency Amount	10	
Current Payment Due	Current Payment Due	Currency Amount	11	
Balance To Finish	Balance To Finish	Currency Amount	12	

Move Up (Left) Move Down (Right) Close

**Action By: Project Manager / Project
Coordinator / Planner**

Example

View Column

Name: Scheduled Value
Data Source: Scheduled Value
Data Format: Currency Amount
Display Mode: View

Close

END TASK

3.4 CHANGE MANAGEMENT

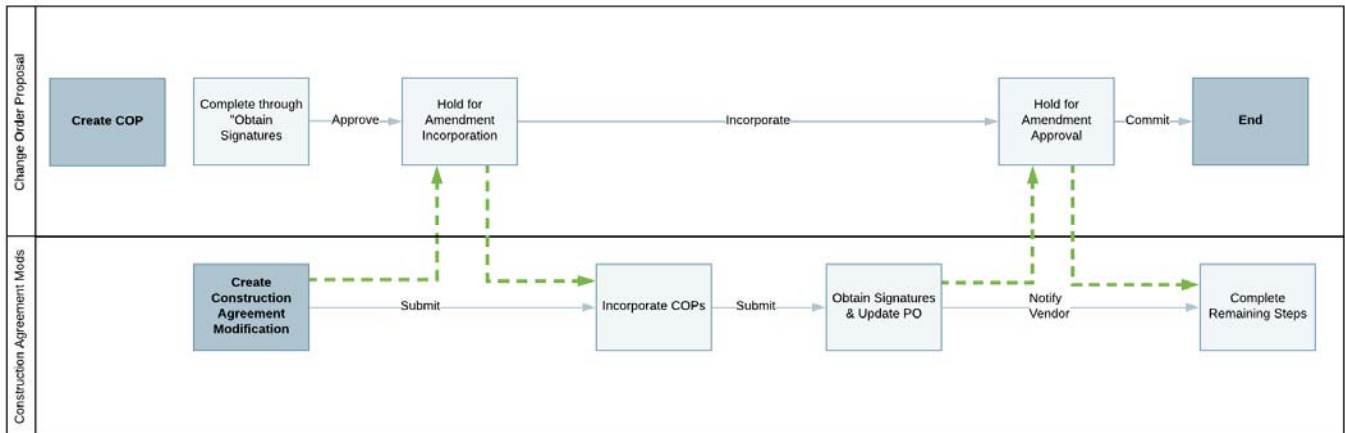
3.4.0 INTRODUCTION (UPDATED 1/27/2020)

Change management takes place any time there is a change to scope, schedule or budget. Depending on the type of change, it may impact contracts as well. A change may also require multiple updates e.g. increasing a contract and increasing a budget.

The Change Order Proposal to Amendment Process is outlined in the help files and has a set pattern that is followed. In short:

- Change Order Proposal is initiated through the “Hold for Amendment Incorporation” step.
- The Construction Agreement Modification is completed using the Change Order Proposal amounts.
 - Note: If the amount of the Amendment does not equal the amount of the sum of incorporated Change Order Proposals, the Amendment will be sent to “Validate Amount of Amendment” step.
- Return to the Change Order Proposal and complete the remaining steps.

The graphic below provides a rough overview of the relationship between the Change Order Proposal to Amendment Process.



3.4.1 MANAGING BUDGET CHANGES (UPDATED 02/25/2020)

- Goals** How to manage changes to the estimated and approved budget.
- Navigation** Project>Change Management>Budget Changes
- Action By** Project Manager / Planner
- Pre-requisites** Approved baseline budget and approved funding allocation.
- Related Files** None.

Action By: Project Manager / Planner

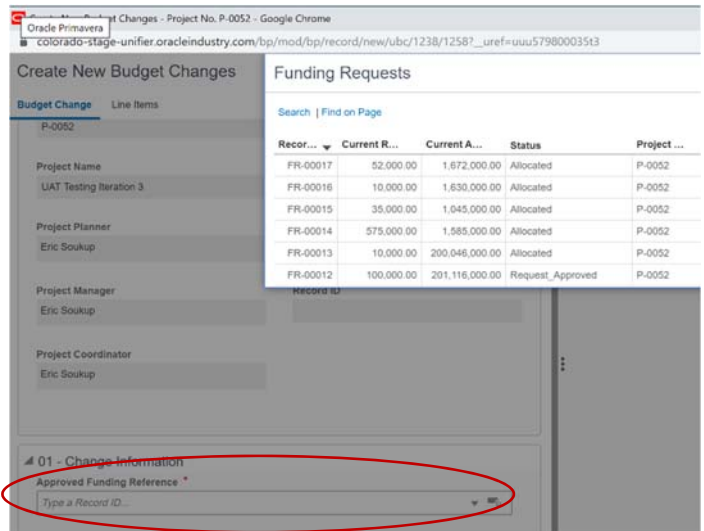
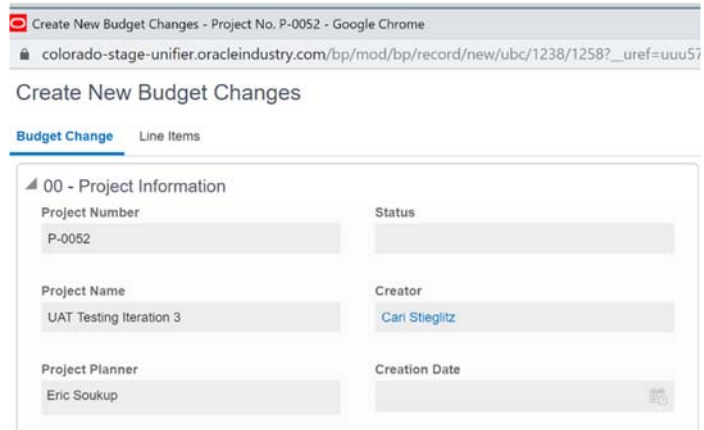
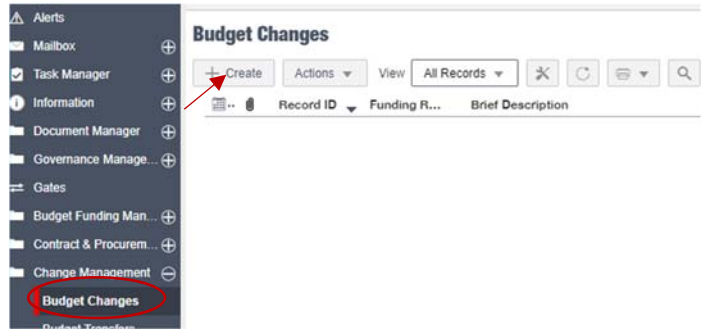
Example

- Navigate** to Project> Change Management>Budget Changes and select "Create".

Note: The purpose of this business process is to record the increase or decrease funding on the budget.

- In 00 – Project Information, **note** that information is automatically populated.

- In 01 – Change Information **select** the approved funding request.
 - Optionally, **type** the record that starts on FR- to select it from the list.



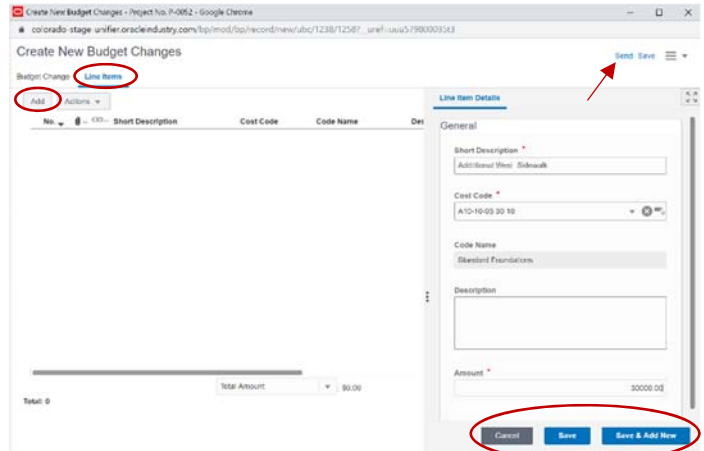
Action By: Project Manager / Planner

Example

4. **Select** “Line Items” from the top tabs.
5. **Select** “Add” to add a line item for the budget change.

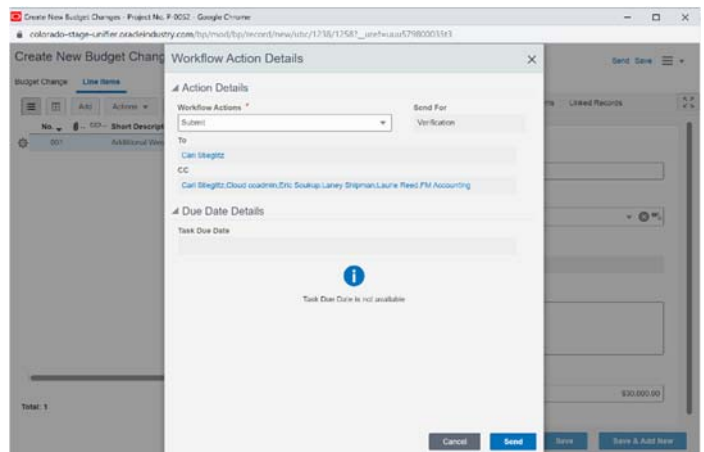
Note: Only record the new amount of added funding, or reduction amount for reduced funding.

- a. **Enter** a short description for the item.
 - b. **Select** the relevant cost code.
 - c. **Add** the amount.
6. **Select** “Save”.
 - a. Optionally, **select** “Save & Add New” to keep adding line items for each relevant cost code.
 7. After all line items are entered, **select** “Send” to open the Workflow Action Details screen.



8. **Select** “Submit” to send the budget change for verification.

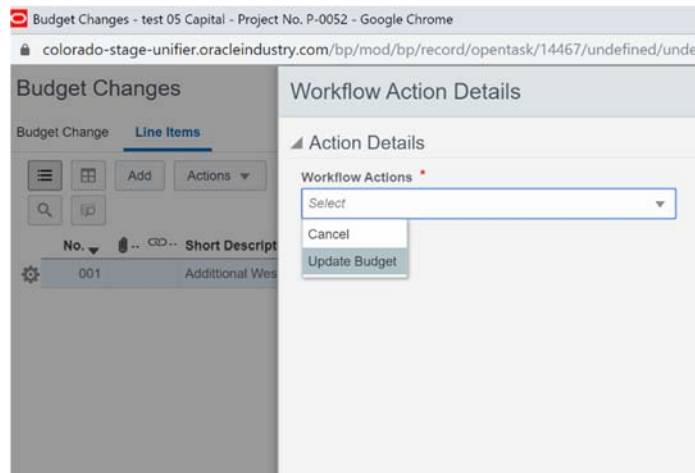
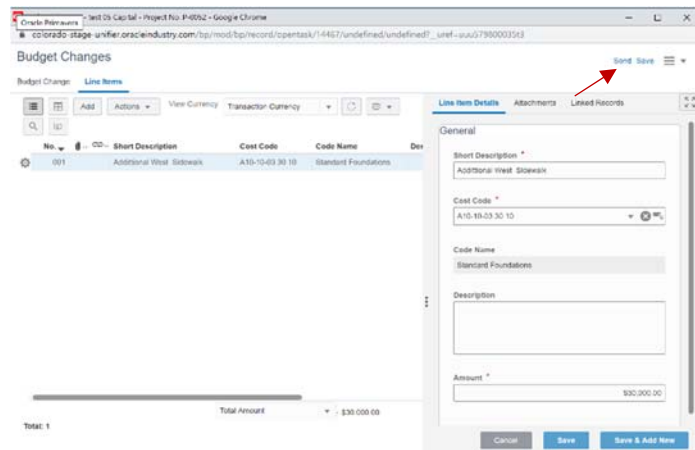
9. **Select** “Send”



Action By: Project Manager / Planner

Example

10. The recipient of the review **receives** notification and opens the budget change.
11. **Select** “Accept” to review the budget change.
12. **Select** “Send” to open the Workflow Action Detail screen.
13. **Select** “Update Budget” to validate the budget change.
 - a. Optionally, select Cancel to not allow the budget change to be approved.



END TASK

3.4.2 MANAGING BUDGET TRANSFERS (UPDATED 02/26/2020)

Goals How to complete transfers between the cost breakdown structure that do not increase or decrease the total budget.

Navigation Project>Change Management>Budget Transfers

Action By Project Manager / Planner

Pre-requisites Approved baseline budget.

Related Files None.

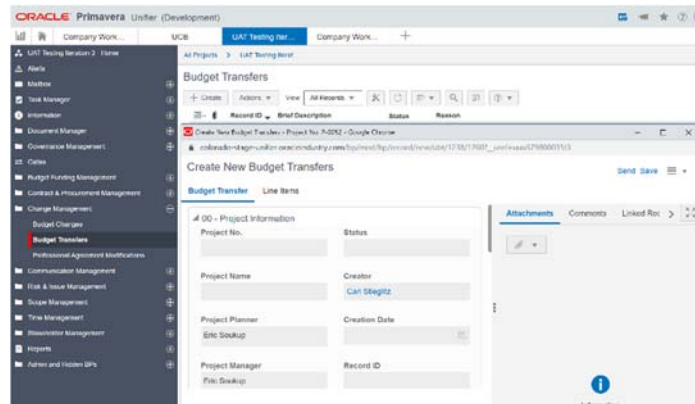
Action By: Project Manager / Planner

Example

1. **Navigate** to Project>Change Management>Budget Transfers and select “Create”.

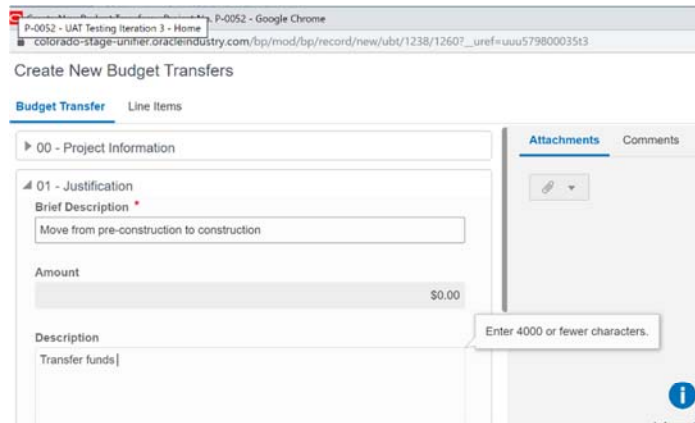
Note: The purpose of this business process is to move budget between line items, with a \$0 end result.

2. In 00 – Project Information, **note** that information is automatically populated.



3. In 01 – Justification **enter** required information.

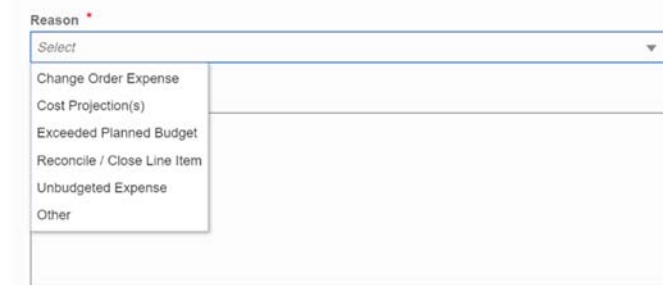
- a. Brief Description: A short justification for the transfer.
- b. Amount: Populated from the line items.
- c. Description: Enter a more thorough description of the transfer.



4. **Select** “Line Items” from the top to start entering costs.

5. **Select** the reason for the transfer.

- a. “Change Order Expense” – change order amount not yet included in the line item.
- b. “Cost Projections” –receive new cost projections.
- c. “Exceeded Planned Budget” – costs exceeding those planned/allocated.



Action By: Project Manager / Planner Example

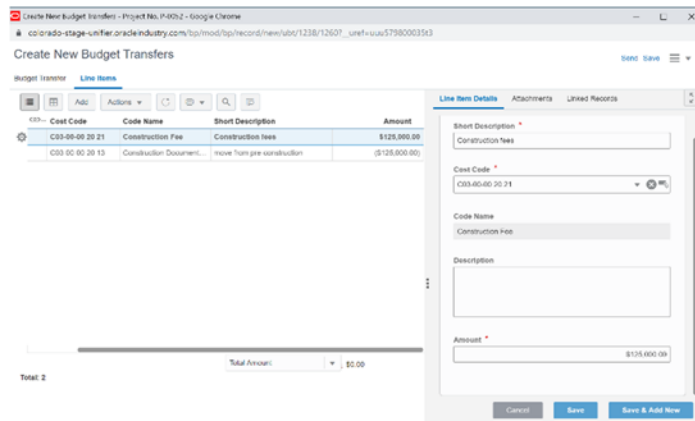
- d. “Reconcile/Close Line Item” – remaining funds not needed for line item.
 - e. “Unbudgeted Expense” - unexpected expense to the project.
 - f. “Other” – reason not covered in the above.
6. **Enter** comments as needed.
 7. **Select** “Line Items” from the top tabs.
 8. **Select** “Add” to add a line item for the budget change.

Note: Include all line items needed for items to which you are adding dollars and items to which you are deducting dollars for a net zero result.

- a. **Enter** a short description for the item.
- b. **Select** the relevant cost code.

Note: Recommend adding all line items (in the line item view), then do the plus and minus amounts in the grid view

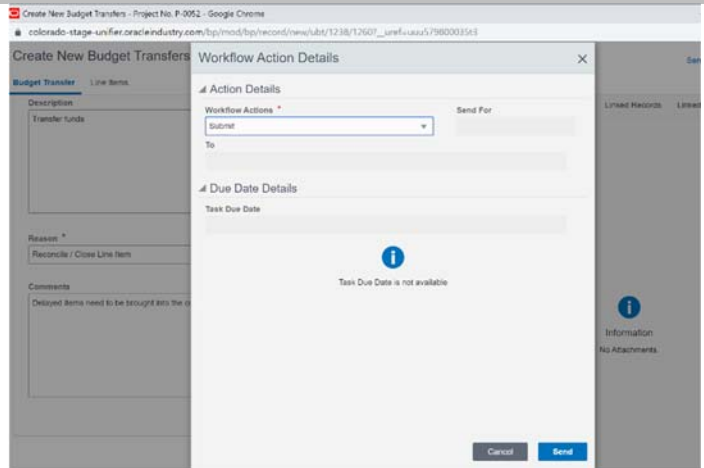
- c. **Add** the amount AS A NEGATIVE AMOUNT to deduct the amount from the line item E.g. (-1,000)
9. **Select** “Save & Add New”.
 10. **Enter** the same amount AS A POSITIVE AMOUNT in one or more line items where the cost codes should be increased.



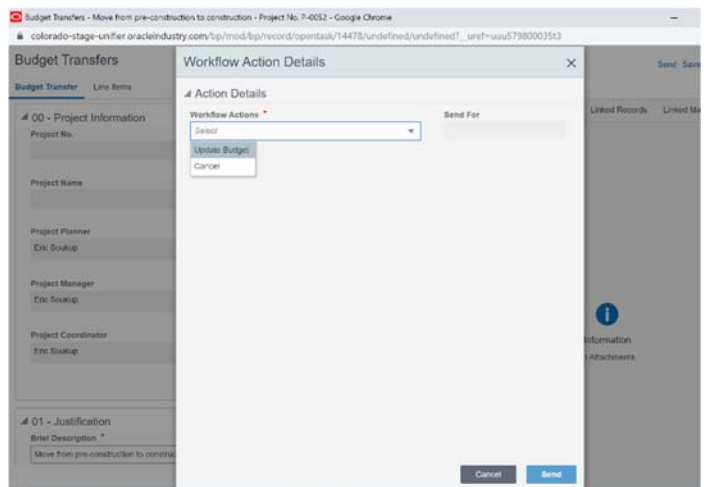
Action By: Project Manager / Planner

Example

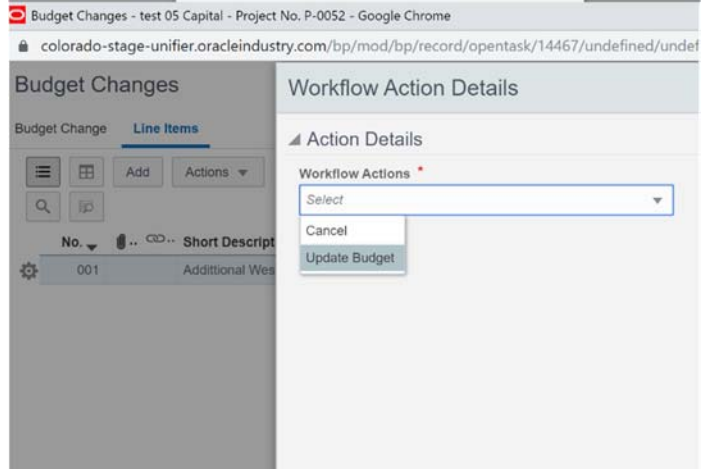
11. After all line items are entered, **select** “Send” to open the Workflow Action Details screen.
12. **Select** “Submit” to send the budget change for verification. Must be net \$0 total.



13. The recipient of the review **receives** notification and opens the budget change.
14. **Select** “Accept” to review the budget change.
15. **Select** “Send” to open the Workflow Action Detail screen.



16. **Select** “Update Budget” to validate the budget change.
 - a. Optionally, select Cancel to not allow the budget change to be approved.



END TASK

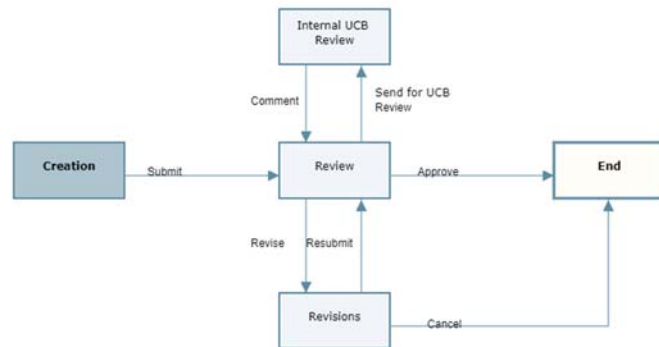
3.4.3 ISSUING A CHANGE ORDER BULLETIN (UPDATED 12/18/2019)

- Goals** How to issue a Change Order Bulletin.
- Navigation** Project>Change Management>Change Order Bulletin
- Action By** Project Manager / Project Coordinator / Planner
- Pre-requisites** Construction Agreement
- Related Files** Contractor Estimate

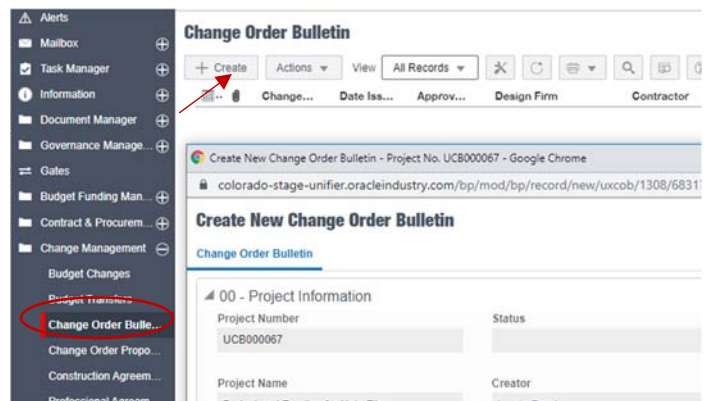
Action By: Project Manager / Project Coordinator / Planner

Example

1. **Note** the Change Order Bulletin Workflow.



2. **Navigate** to Project>Change Management>Change Order Bulletin
3. **Select** "Create".



Action By: Project Manager / Project Coordinator / Planner

Example

In 00 – Project Information

4. Greyed fields will auto-populate as appropriate.
5. **Enter** data for red asterisked fields
6. Attachment, Comments, etc. may be added using the buttons on the right-hand side.

In 01 – General Information.

7. **Select** the Contractor and Design firm name from the pickers.
8. **Enter** data for other fields as known.

Action By: Project Manager / Project Coordinator / Planner

Example

In 02 – Description of Work

- 9. **Enter** data for red asterisked fields
- 10. **Enter** data for other fields as known

- 11. **Select** Send to send the Business Process into the workflow.

- 12. **Select** Save to save as a draft and complete later

- 13. **Select** “Send” to open the Workflow Action Details screen.

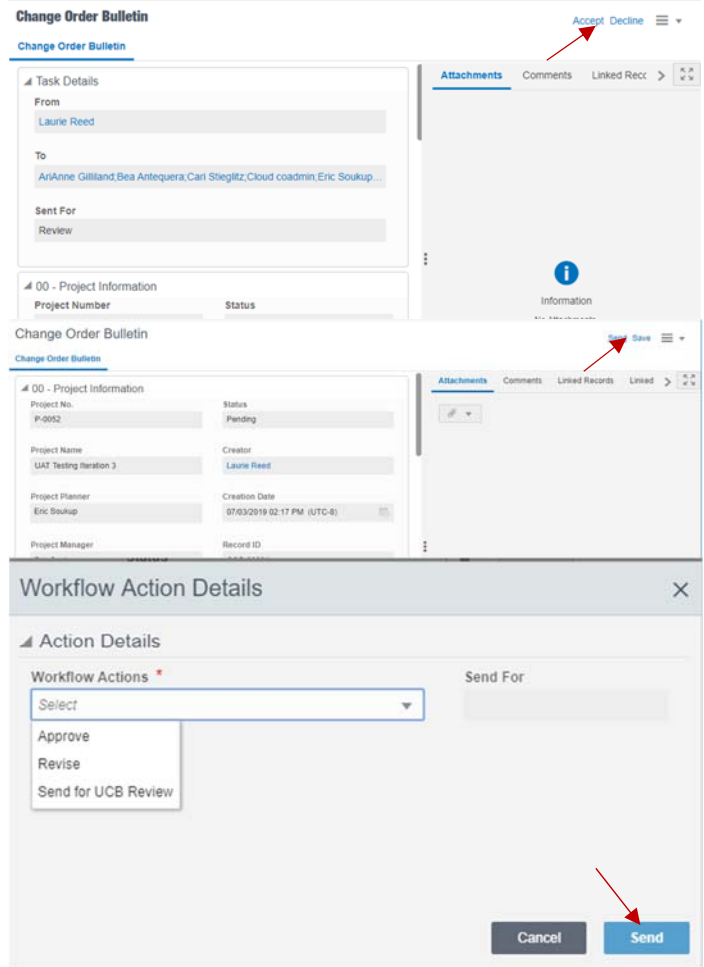
- 14. **Select** “Submit” to send the COB for review.

Note: The “To” field is auto populated with the PM, PC and Planner for Review.

Action By: Project Manager / Project Coordinator / Planner

Example

15. The recipient Locates the task, opens the record.
16. **Select** “Accept”
17. Review the information.
18. **Select** “Send” to open the Workflow Action Detail screen.
19. **Selecting** Send opens Workflow Actions
20. **Select** “Approve” is a terminal step for the Business Process. Email notifications is sent to all parties. (For more information please see 3.10.3 Printing a Report, Custom Print or State Form)
 - a. Optionally, **select** “Revise” to send the Business Process to the Creator for revision and return for Review. Best practice is to add Comments for the reason to Revise.
 - b. Optionally, **select** “Send for UCB Comments” sends the Business Process to the selected UCB Reviewer for internal review and comment.



Note: When UCB review is needed, send to Project Coordinator to route through the Adobe review process. If only one UCB reviewer is required, could be sent through Unifier for comment (depends on complexity of document – Adobe markup is much easier than Unifier markup at this time).

Note: All Workflows will have a User select “To” field.

Action By: Project Manager / Project Coordinator / Planner

Example

21. **Select** “Send”

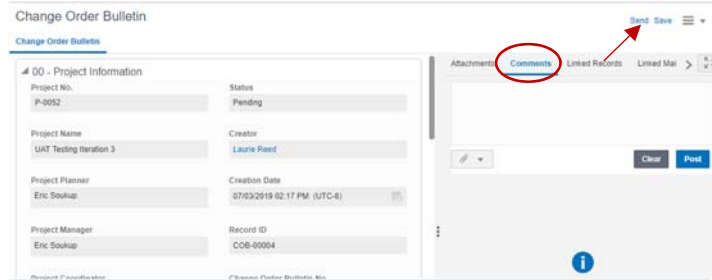
22. Reviewer locates the task, opens the record, and accepts the task.



23. All information is reviewed

24. Best Practice is to add Comments regarding the review

25. **Select** Send

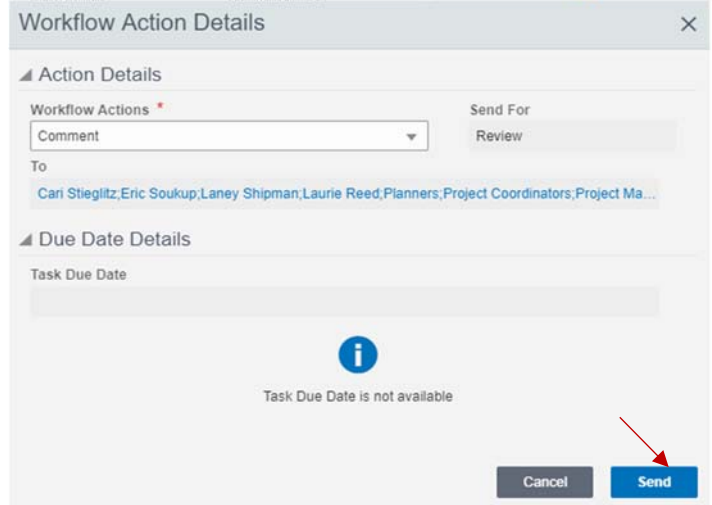


26. In this step Comment is the only option and sends the Business Process to the Review action for review.

27. The “To” field is auto populated

28. **Select** Send

29. Reviewer will then have the same Workflow Action options as before, based on UCB Comments received.

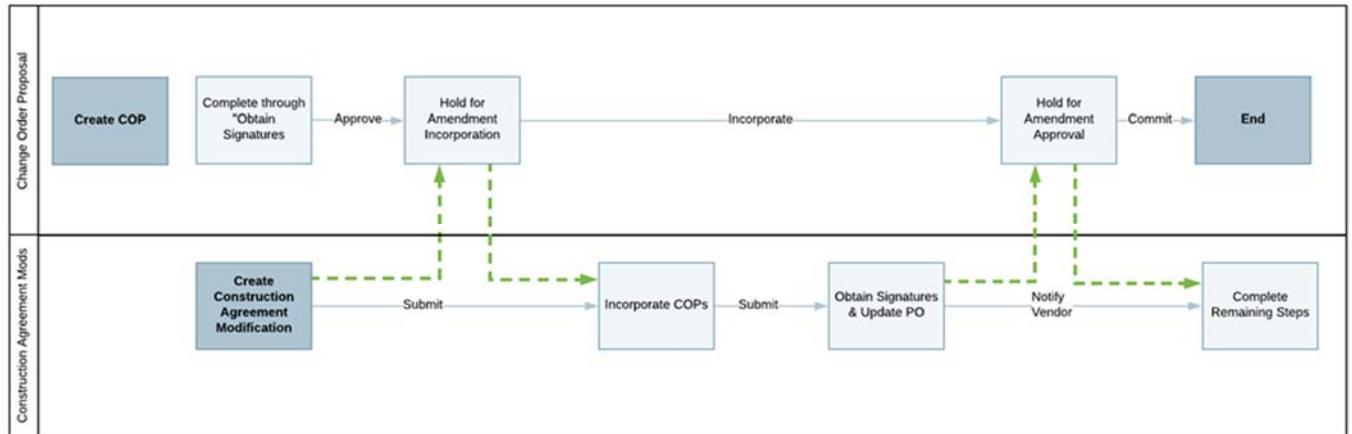


END TASK

3.4.4 COMPLETING A CHANGE ORDER PROPOSAL (UPDATED 12/19/2019)

- Goals** How to create and complete a change order proposal and maintain it for inclusion in a modification.
- Navigation** Project>Change Management>Change Order Proposal
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Construction Agreement
- Related Files** Change Order Bulletin / Contractor Estimate

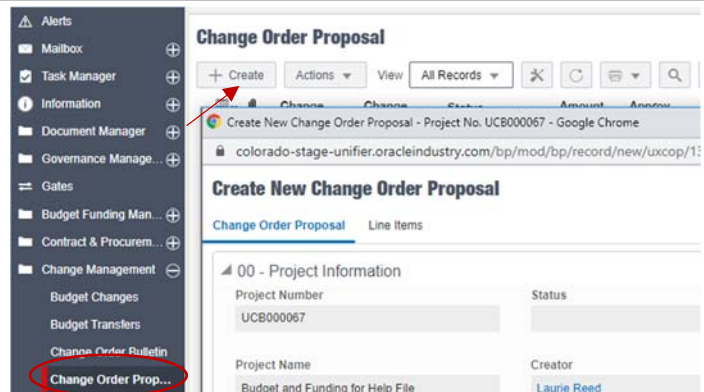
The graphic below provides a rough overview of the relationship between the Change Order Proposal to Amendment Process



Action By: PM / PC / Planner

Example

1. **Navigate** to Project>Change Management>Change Order Proposal.
2. **Select** "Create" to open a new record.

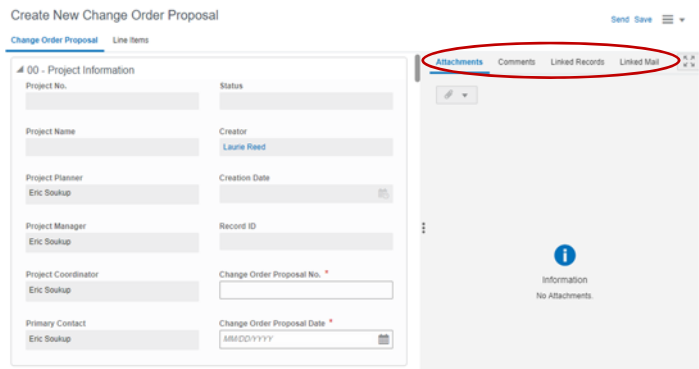


Action By: PM / PC / Planner

Example

In 00-Project Information:

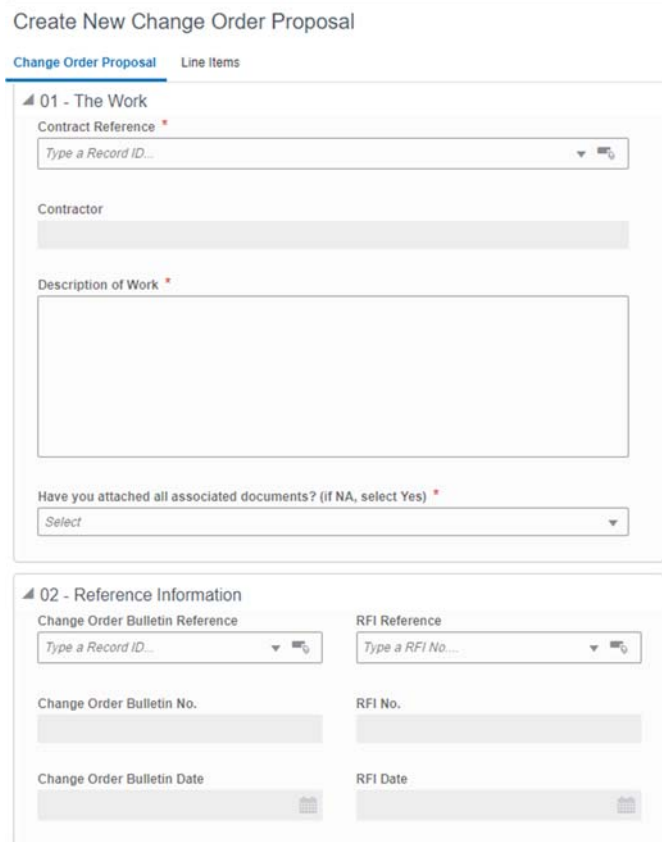
3. Greyed fields will auto-populate when a Contract/PO reference is selected
4. **Enter** data for red asterisked fields (required).
5. Attachment, Comments, etc. may be added using the buttons on the right-hand side.



In block 01 – The Work & 02 – Reference Information:

6. **Enter** data for red asterisked fields.
7. Greyed fields will auto-populate as appropriate.
8. Greyed fields on the right-hand side are sum formulas based on current plus all past invoices.

Note: Change Order Bulletin Reference and RFI Reference will appear as selections from previously approved Business Processes.



Action By: PM / PC / Planner

Example

In 03 – Work Performed by Contractor:

9. **Enter** data for red asterisked fields.

10. Greyed fields will calculate as appropriate.

03 - Work Performed by Contractor

1. Direct Labor Costs *	<input type="text" value="0.00"/>
2a. Labor Overhead (%) *	<input type="text" value="0"/>
2b. Labor Overhead (\$)	<input type="text" value="0.00"/>
3. Total Contractor's Labor Costs	<input type="text" value="0.00"/>
4. Direct Materials Cost *	<input type="text" value="0.00"/>
5a. Materials Overhead (%) *	<input type="text" value="0"/>
5b. Materials Overhead (\$)	<input type="text" value="0.00"/>
6. Total Materials Costs	<input type="text" value="0.00"/>
7. Total Equipment Costs *	<input type="text" value="0.00"/>
8. Total Contractor's L, M & E Costs	<input type="text" value="0.00"/>

Action By: PM / PC / Planner

Example

In 04 – Work Performed by Subcontractor:

11. **Enter** data for red asterisked fields.
12. Greyed fields are formulas and will calculate as appropriate.
13. Ensure the correct checkbox is selected as only one or the other can be chosen

04 - Work Performed by Subcontractor

9. Direct Labor Costs *	<input type="text" value="0.00"/>
10a. Labor Overhead (%) *	<input type="text" value="0"/>
10b. Labor Overhead (\$)	<input type="text" value="0.00"/>
11. Total Contractor's Labor Costs	<input type="text" value="0.00"/>
12. Direct Materials Cost *	<input type="text" value="0.00"/>
13a. Materials Overhead (%) *	<input type="text" value="0"/>
13b. Materials Overhead (\$)	<input type="text" value="0.00"/>
14. Total Materials Costs	<input type="text" value="0.00"/>
15. Total Equipment Costs *	<input type="text" value="0.00"/>
16. Total Contractor's L, M & E Costs	<input type="text" value="0.00"/>
17a. Subcontractor's Overhead (%)	<input type="text" value="0.1"/>
17b. Subcontractor's Overhead (\$)	<input type="text" value="0.00"/>
<input type="checkbox"/> 18a. Subcontractor's Profit Addition	
18b. Subcontractor's Profit (\$ Add)	<input type="text" value="0.00"/>
<input type="checkbox"/> 18c. Subcontractor's Profit Deduct	
18d. Subcontractor's Profit (\$ Deduct)	<input type="text" value="0.00"/>
18e. Subcontractor's Profit (\$)	<input type="text" value="0.00"/>
19. Total Subcontractor's Costs	<input type="text" value="0.00"/>

Action By: PM / PC / Planner

Example

In 05 – Contractor’s Overhead & Profit:

14. Greyed out fields are formulas and will auto-populate as appropriate.

▲ 05 - Contractor's Overhead & Profit

20a. Contractor's Overhead (%)	10
20b. Contractor's Overhead (\$)	\$0.00
21a. Contractor's Profit (%)	5
21b. Contractor's Profit (\$)	\$0.00
22. Contractor's Overhead & Profit	\$0.00

In 06 – Contractor’s Mark-up on Subcontractor:

15. Greyed out fields are formulas and will auto-populate as appropriate.

16. **Ensure** the correct checkbox is selected as only one or the other can be chosen.

▲ 06 - Contractor's Markup on Subcontractor

23a. Contractor's Commission on Subcontractor (%)	5
23b. Contractor's Commission on Subcontractor (\$)	\$0.00
<input type="checkbox"/> 24a. Contractor's Profit Addition	
24b. Contractor's Profit (\$ Add)	\$0.00
<input type="checkbox"/> 24c. Contractor's Profit Deduct	
24d. Contractor's Profit (\$ Deduct)	\$0.00
24e. Contractor's Profit	\$0.00
25. Contractor's Markup on Subcontractor	\$0.00

In 07 – Subtotal CO Proposal:

17. Greyed out fields are formulas and will auto-populate as appropriate.

▲ 07 - Subtotal CO Proposal

Subtotal C.O. Proposal	0.00
------------------------	------

Action By: PM / PC / Planner

Example

In 08 – Contractor’s Bond Cost – 09
Grand Total CO Proposal:

- 18. **Enter** data for red asterisked fields.
- 19. Greyed fields are formulas and will calculate as appropriate.

08 - Contractor's Bond Cost

Contractor's Bond Cost (%) * 0

Contractor's Bond Cost (\$) 0.00

Are there additional bond and/or insurance costs? *
Select

Additional Bond/Insurance Cost (\$) 0.00

Total Contractor's Bond/Insurance Cost (\$) 0.00

09 - Grand Total CO Proposal

Grand Total COP (\$) 0.00

In 10 – Contract Time:

- 20. **Check** only one box and enter the appropriate value. If the Contract Time is Extended or Reduced, a number not equal to 0 must be entered.

10 - Contract Time

Extended

No Change

Reduced

Extended/Reduced Calendar Days to Completion
0

- 21. **Select** Line Items at the top of the page.
- 22. **Select** Add.
- 23. **Enter** data for red asterisked fields.
- 24. Greyed fields will auto-populate as appropriate.
- 25. **Select** Cancel to cancel the current entry
- 26. **Select** Save to save current entry.

Create New Change Order Proposal

Change Order Proposal **Line Items** Send Save

Add Actions

No.	Cost Co...	Short Description	Amount	Grand Total COP (\$)

Total: 0 Total Amount 0.00

Line Item Details

00 - General

Cost Line Item Type *
Select

Short Description *

Cost Code *
Type CBF Code or Name

Code Name

Amount 0.00

Grand Total COP (\$) 0.00

Cancel Save Save & Add New

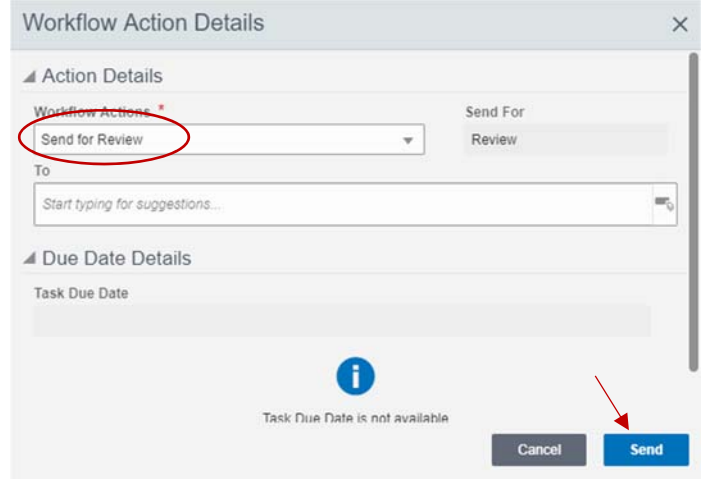
Note: Optionally, can select Save & Add New to save current entry and add another.

Note: Total Amount must equal Grand Total COP.

Action By: PM / PC / Planner

Example

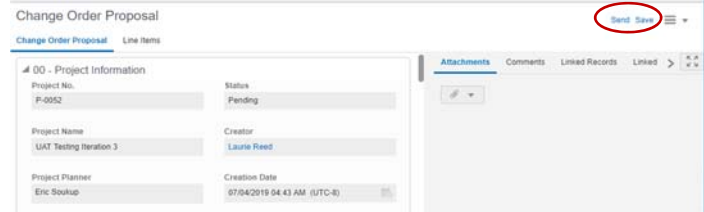
27. **Select** “Send” to send the Business Process into the workflow.
Alternatively, Select Save to save as a draft and complete later.
28. **Clicking** send opens the Workflow Action Details
29. In this step “Send for Review” is the only option.
Note: “To” field is User select and Recipient(s) must be selected.
30. **Select** “Send” to Send for Review



31. Recipient **locates** their Task, **opens** the record, and **Accepts**.



32. Reviewer reviews all data entry, attachments, comments, etc.
Note: Attachment, Comments, etc. may be added as necessary.

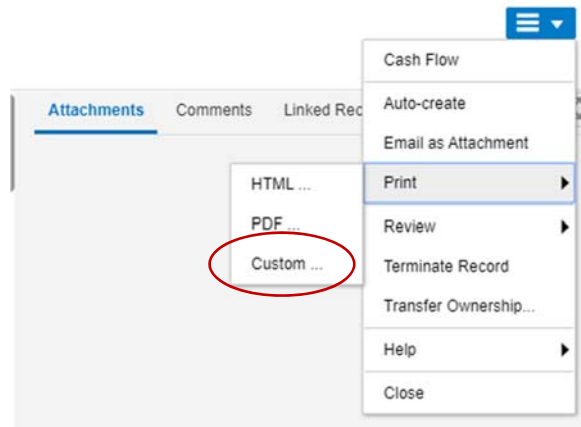


33. **Select** “Send” or “Save” to open the Workflow Action Details screen.

34. Recipient **locates**, **opens** and **accepts** the task.

Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.

35. **Select** the hamburger icon in the upper left corner and navigate to Print>Custom...



Action By: PM / PC / Planner

Example

36. **Select** “SC-6.311” to highlight the correct output.
37. **Ensure** the format is PDF.
38. **Select** “Print” to generate the PDF.
39. **Save** the PDF for upload into DocuSign.

The screenshot shows a 'Print' dialog box with the following elements:

- Title Bar:** 'Print' and a close button (X).
- Custom Print Template:** A dropdown menu showing 'Title' and a list of templates, with 'SC-6.311 Change Order Bulletin' selected.
- Template and Format:** Two dropdown menus. The 'Template' dropdown is set to 'SC-6.311' and the 'Format' dropdown is set to 'PDF'.
- Buttons:** 'Cancel' and 'Print' buttons at the bottom right.

40. **Route** agreement through DocuSign with applicable attachments and routing document.
41. Upon executed agreement, **request** PO from Marketplace.
42. **Wait** until all signatures are obtained with any relevant documents.

Action By: PM / PC / Planner

Example

- 43. After all signatures are obtained, **return** to Unifier and **open** the accepted task.
- 44. **Enter** remaining data for red asterisked fields.
- 45. **Attach** executed agreement and Purchase Order.
- 46. **Select** “Send” to open the Workflow Actions Detail screen. .

- 47. **Select** “Approve” to send the Business Process to the Hold for Amendment Incorporation step. At this step the Change Order Proposal is available to be incorporated into an amendment.
 - a. Optionally, **select** “Return” to send the Business Process back to the Review step. As a best practice comments should be included as to the reason for Return.
 - b. Optionally, **select** “Reject w/Comments” to terminate the record.

“To” field is User select and Recipient(s) must be selected.

- 48. **Select** “Send”.
- 49. After a Construction Agreement Modification (CAM) is created, the Creator will locate the Change Order Proposal (COP) to be incorporated.
- 50. Open the COP to be incorporated. A new block, 01-Amendment

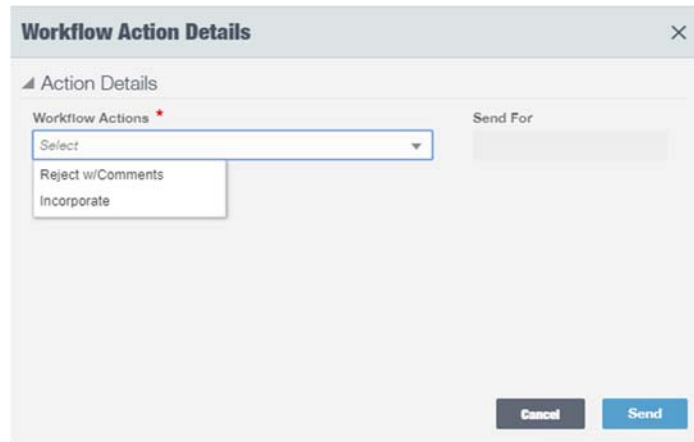
Action By: PM / PC / Planner

Example

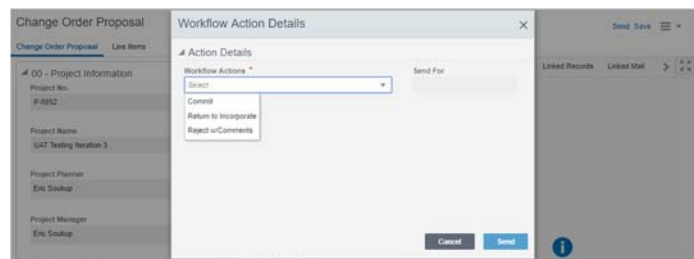
Incorporation will appear in order to reference a CAM once the record is Accepted.

State C...	Vendor	Amend...	Amount...	Revised...	Amend...	Project...	Project Name	Project Manager	Project Planner	Record ID
SC48A...	BIGSTUF	014	1,300.00	21,300.00		P.0052	UAT Testing Iteration 3	Eric Soukup	Eric Soukup	CAM-00014
SC48B...	BIGSTUF	001	2,500.00	22,500.00	09/23/2019	P.0052	UAT Testing Iteration 3	Eric Soukup	Eric Soukup	CAM-00013
SC48B...	BIGSTUF	202	115.00	20,115.00	09/21/2019	P.0052	UAT Testing Iteration 3	Eric Soukup	Eric Soukup	CAM-00012
SC48B...	BIGSTUF	201	115.00	20,115.00		P.0052	UAT Testing Iteration 3	Eric Soukup	Eric Soukup	CAM-00011
SC48B...	BIGSTUF	100	750.00	10,750.00		P.0052	UAT Testing Iteration 3	Eric Soukup	Eric Soukup	CAM-00010

51. **Select** the select button and select the CAM that you want to incorporate the COP from the list.
52. **Select** “Send” to open the Workflow Action Details screen.
53. **Select** “Incorporate” to send the Change Order Proposal to the Hold for Amendment Approval step.
54. Optionally, **select** “Reject w/Comments” to terminate the record.
55. **Select** “Send”
56. **Wait** until the Construction Agreement Modification (CAM) is in the “Close Incorporated COPs” step.



57. When the CAM is in the Close Incorporated COPs step, Creator will locate, open, and accept the record.
58. Select “Commit” to confirm the incorporation. Note this is a terminal step for the Business Process
 - a. Optionally, select “Return to Incorporate” sends the COP to the Return to Incorporate.



Note: The COP must be manually removed from the CAM in the Construction Agreement Modification record and the CAM reference removed in the COP record. Ask someone for more help if you get stuck.

- b. Optionally, select “Reject w/Comments” to terminate the record.

Note: “To” field is User select and Recipient(s) must be selected.

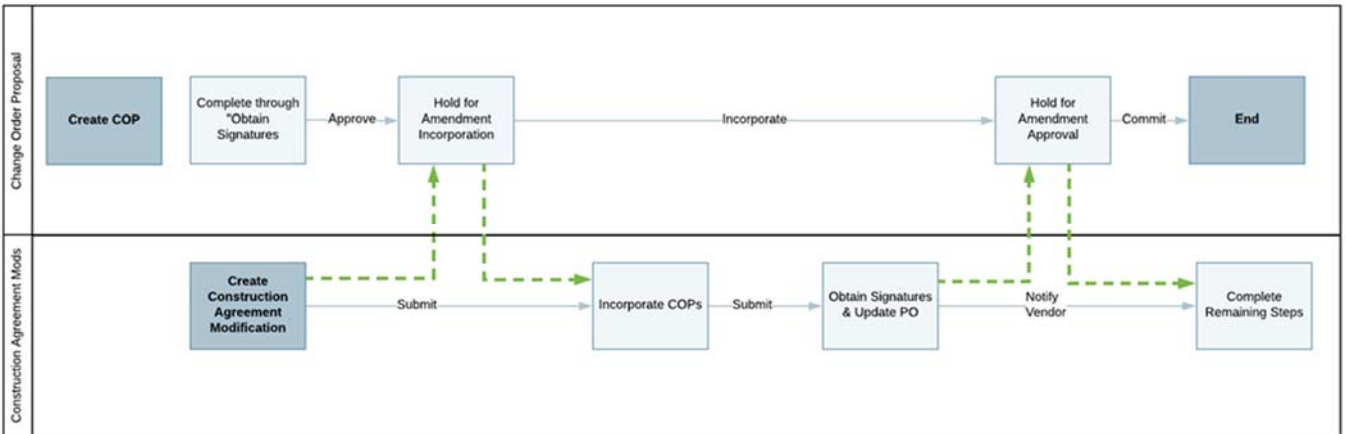
59. **Select** “Send”.

END TASK

3.4.5 MODIFYING A CONSTRUCTION AGREEMENT (UPDATED 03/11/2020)

- Goals** How to consolidate change order proposals into a construction agreement modification, including generating state forms.
- Navigation** Project>Change Management>Construction Agreement Modifications
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Construction Agreements
- Related Files** Change Order Proposal / Contractor Estimate

The graphic below provides a rough overview of the relationship between the Change Order Proposal to Amendment Process



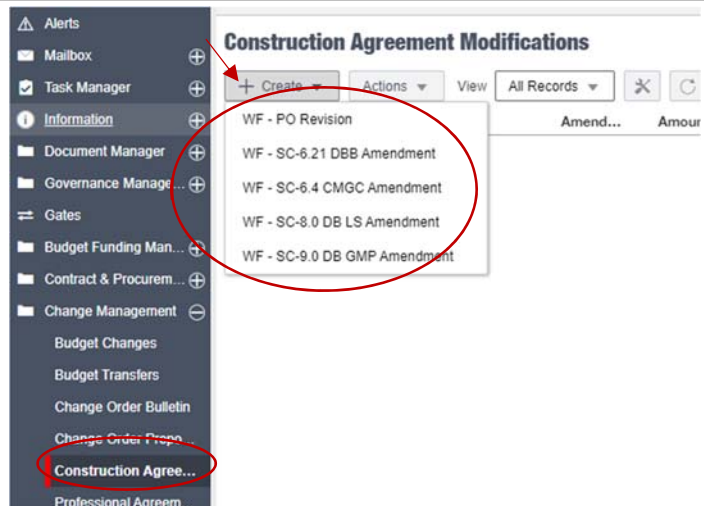
Action By: PM / PC / Planner

Example

1. **Navigate** to Project>Change Management>Construction Agreement Modifications
2. **Select** "Create".

Note: This file will demonstrate modifying a SC-6.4 agreement.

Note: There are workflow (WF) options for the type of agreement you are requesting. Choose the appropriate agreement. Each agreement has similar but different required fields for data entry



Action By: PM / PC / Planner

Example

In 00 – Project Information:

Note: The type of amendment is shown in the top left-hand corner.

3. Greyed fields will auto-populate as appropriate.
4. **Enter** data for red asterisked fields.
5. Attachment, Comments, etc. may be added using the buttons on the right-hand side.

In 01 - Contractor Information

6. Greyed fields will auto-populate based on the Original Contract selected below.

In 02 - Purpose of Amendment

7. **Enter** data for red asterisked field; explain the background of the amendment.

Note: Blocks 01 and 02 are consistent for all agreements, with slight field name variations accordingly.

Action By: PM / PC / Planner

Example

In 03 - Contract Recitals:

- 8. **Enter** data for red asterisked fields.
- 9. Greyed fields will auto-populate based on Contract/PO chosen
- 10. "Amount of this Amendment" is a sum of Cost Line Items

03 - Contract Recitals

Original Contract *

Guaranteed Maximum Price (\$) *

Fixed Limit of Design & Construction Cost (\$) *

Effective Date

Original Obligation to Pay (\$)

Previous Approved Amendments

Amount of this Amendment

Revised Obligation to Pay (\$)

Appropriated Funds (\$)

In block 04 – Time of Completion & 05 Principal Representative:

- 11. **Enter** data for red asterisked fields.

Note: Principal Representative defaults to 'Ronald L. Ried, Direct, IS Business Services' but is editable via the drop-down menu.

04 - Time of Completion

Date of Substantial Completion *

05 - Principal Representative

Principal Representative *

- 12. **Access** Modification Recitals at the top of the page.

- 13. **Select** Add

Construction Agreement Modifications

Modifies SC-6.21 Cost Line Items COPS Modification Recitals

Action By: PM / PC / Planner

Example

- 14. **Enter** data for red asterisked fields
- 15. **Select** “Cancel” to cancel the current entry
- 16. **Select** “Save” to save current entry
- 17. **Select** “Save & Add New” to save current entry and add another.

Note: Purpose of Modification Recitals is to itemize all changes to the agreement as part of the amendment. This may include scope changes, dates, cost, etc. The bulk of the narrative detail is derived from Modification Recitals

Note: Standard language for recitals is included in Section 5.

- 18. **Select** “Send” to send the Business Process into the workflow. **Select** “Save” to save as a draft and complete later.

- 19. **Clicking** “Send” opens the Workflow Action Details screen.
- 20. In this step “Submit” is the only option and sends the record for “Incorporate COPs”.
- 21. **Select** “Send”

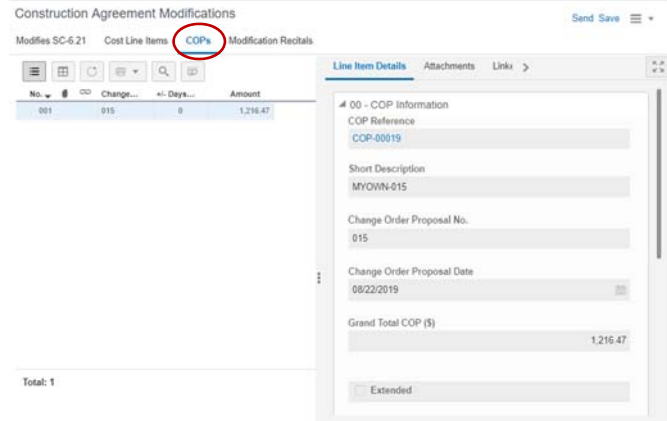
Action By: PM / PC / Planner

Example

22. Only COPs that have been Incorporated into this CAM via the COP Business Process will be populated

Note: Incorporation of COP(s) will occur in the next workflow step (Incorporate COPs) in the Change Order Proposal BP.

Note: Refer to the graphic demonstrating the relationship between the Change Order Proposal to Amendment process.

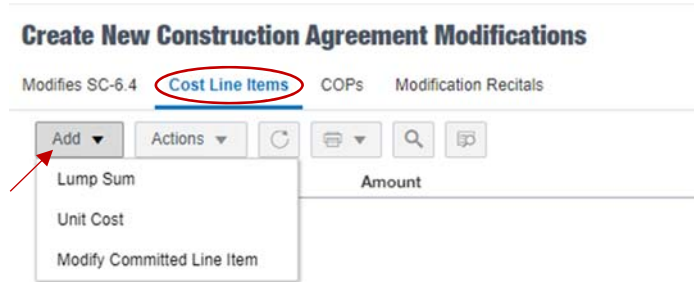


23. In addition to incorporating COPs, Cost Line Items may be added in this step as well.

24. Cost Line Items is accessed at the top of the page.

25. **Select** "Add"

26. Line Items can be added individually by clicking Add and choosing "Lump Sum" from the options shown.



Action By: PM / PC / Planner

Example

27. **Enter** data for red asterisked fields
28. You can **cancel** the entry by clicking “Cancel” at the bottom of the page
29. **Clicking** “Save” or “Save & Add New” at this point will give you an error message until you enter a Cost Breakdown for the Line

30. **Access** Cost Breakdown at the top of the page
31. Select the + symbol and choose the associated Cost Code
32. **Enter** Amount.

Note: more than one Cost Code may be assigned to a single Line Item.

Note: Not Costed Amount must equal 0.00 for a Lump Sum entry

33. **Select** “Save” to save the Cost Breakdown to the Line entry

Note: Not Costed Quantity must equal 0 for a Unit Cost entry

34. **Select** “Cancel” to cancel the entire Contract Line entry
35. **Select** “Save” to save the Cost Breakdown to the Line entry

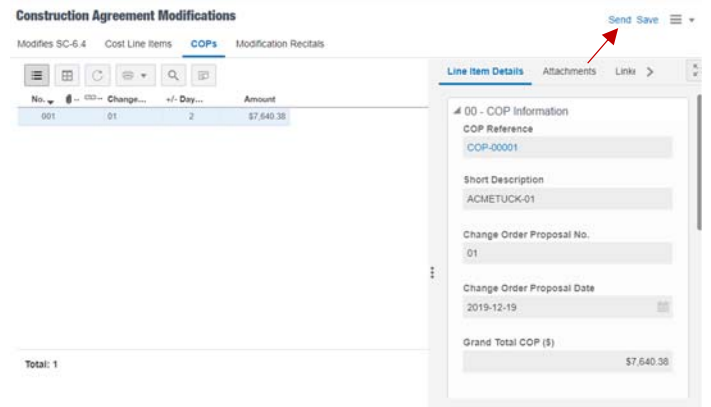
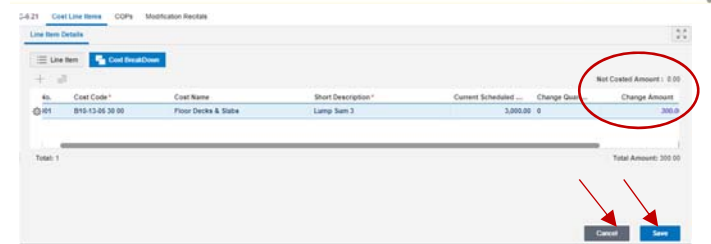
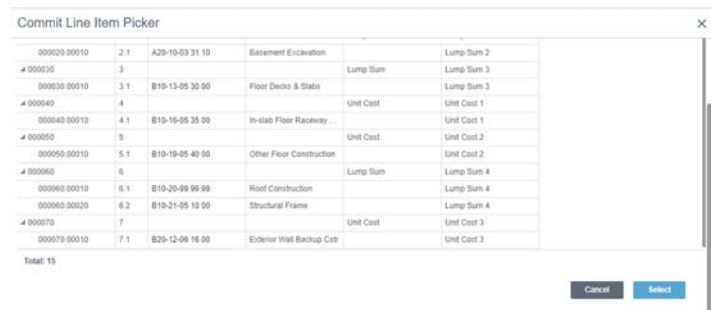
Action By: PM / PC / Planner

Example

36. Optionally, **selecting** “Modify Committed Line Item” from the “Add” button drop down displays all committed line items in the contract.
37. **Double select or highlight and select** “Select” to choose the Line Item to Modify.
38. **Enter** the Change Amount for Lump Sum.

Note: Not Costed Amount must equal 0.00 for a Lump Sum.
39. **Select** ‘Cancel’ to cancel the entire Contract Line entry
40. **Select** “Save” to save the Cost Breakdown to the Line entry.
41. After the record is sent into the workflow, the recipient **locates** the Task, **opens** the record and **accepts**.
42. The incorporated COP(s) are now visible in the COPs tab.

Note: “Amount this Amendment” is now populated with the total of all incorporated COPs and Cost Line Items.
43. **Select** “Send”

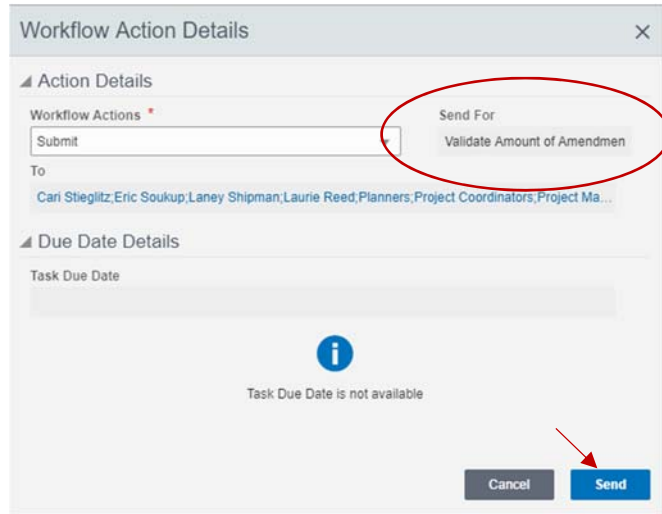
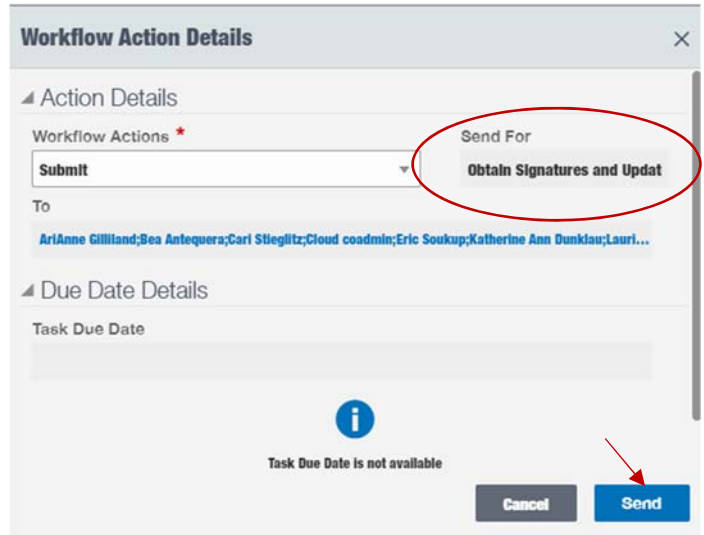


Action By: PM / PC / Planner

Example

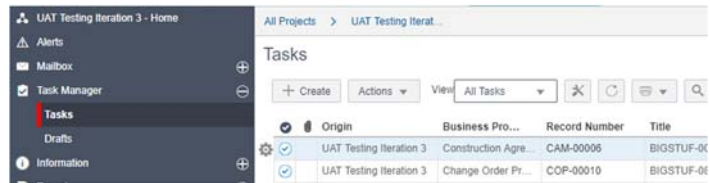
44. In this step, "Submit" is the only option and is pre-selected.
- a. If the total amount of the COP(s) does not equal the Total Amount of the Amendment, the Send For will say "Obtain Signatures and Update".
 - b. If the total amount of the COP(s) did not equal total Amount of the Amendment (cost line items were added in addition to incorporated COPs, for example), the Business Process will be sent to "Validate Amount of Amendment".

Note: In this case, the Amendment will be routed back to you for additional information. Continue to modify until the COP(s) are equal to the Total Amount of the Amendment.

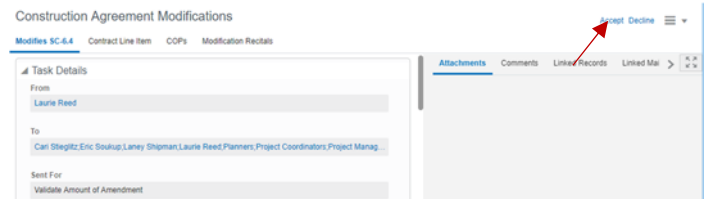


45. **Select "Send"**.

46. Recipient **locates** their Task and **opens** the record.



47. **Select "Accept"** to open the record.



Action By: PM / PC / Planner

Example

48. **Enter** data for red asterisked fields. Some of the fields will be reset, while some remain populated with previous entries but remain editable.

Note: 01-Validate amount of Amendment is a new required block.

49. **Review** previous entries and modify if necessary. It is allowed for an amendment total to not equal total amount of COP(s). It is best practice to enter Comments that indicate the what changes, if any, were done.

50. **Select** “Send”

51. Clicking send opens the Workflow Action Details

52. In this step “Submit” is the only option.

53. “To” field is User select and Recipient(s) must be selected.

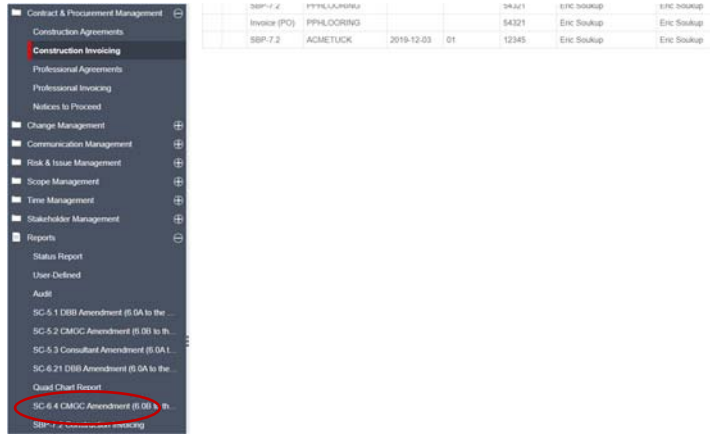
54. **Select** “Send” to send for Obtain Signatures and Update

55. Recipient **locates** their Task, **opens** the record and **Accepts**.

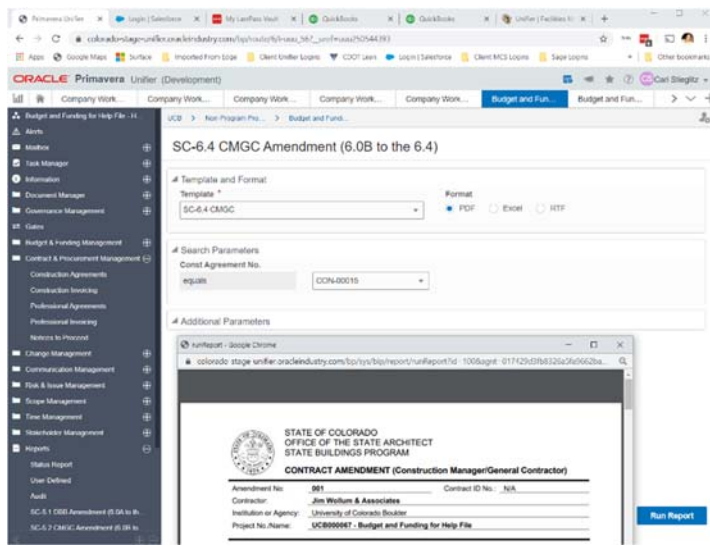
Action By: PM / PC / Planner

Example

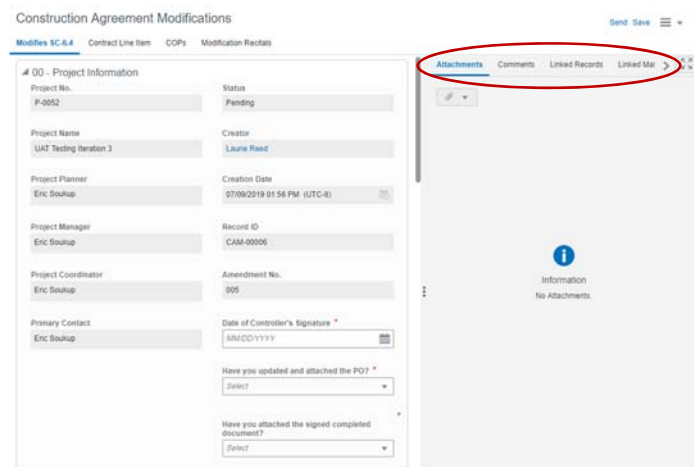
- 56. Recipient **locates, opens and accepts** the task.
- Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.
- 57. **Note** the Construction Agreement Number.
- 58. **Navigate** to Reports>SC-6.4 CMGC Amendment (6.0B to the 6.4) and selects to open the report screen.



- 59. **Ensure** the format is PDF.
- 60. Under Search Parameters, **select** the Construction Agreement number.
- 61. **Select** “Run Report” to generate the PDF.
- 62. **Save** the PDF for upload into DocuSign.
- 63. **Route** agreement through DocuSign with applicable attachments and routing document.
- 64. **Wait** until all signatures are obtained in DocuSign.
- 65. **Update** PO in Marketplace.



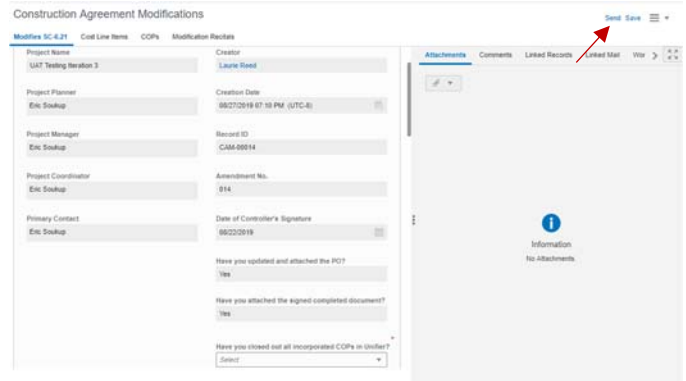
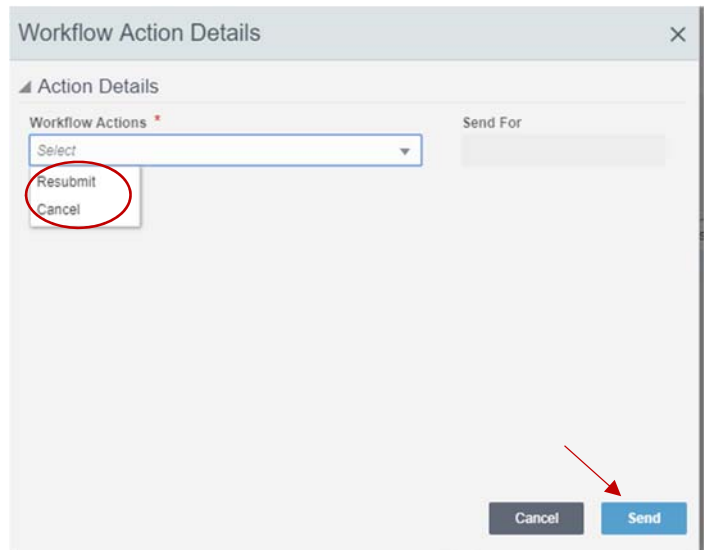
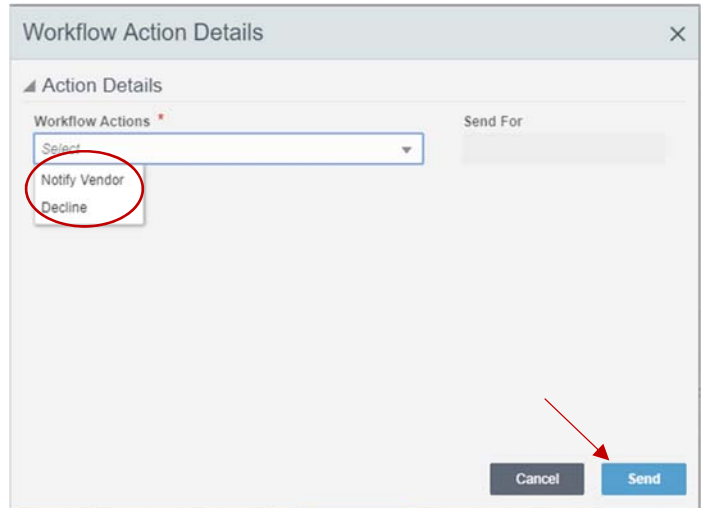
- 66. **Return** to Unifier and open the modification task.
- 67. **Enter** data for red asterisked fields once known.
- 68. **Add** Attachment, Comments, etc. as necessary.
- 69. **Select** “Send” to open the Workflow Action Details screen.



Action By: PM / PC / Planner

Example

70. **Select** “Notify Vendor” to send the Business Process to Close Incorporated COPs. At this step Creator returns to the COP(s) incorporated into the CAM to “Commit” the COP(s).
 - a. Optionally, **select** “Decline” to send the Business Process to the Creator for revision. Best practice is to add Comments for the reason to Decline.
71. Both Workflows will have a User select “To” field.
72. **Select** “Send”
73. If Revision is selected:
74. Creator **locates** and **Accepts** the task.
75. **Reviews** Comments provided and makes corrections as requested.
76. Open Workflow Actions
77. In this step the Creator has two Workflow options.
78. **Select** “Resubmit” to resend the Business Process to the “Obtain Signatures and Update” step.
 - a. Optionally, **select** “Cancel” to terminate the record.
79. Both Workflows will have a User select “To” field.
80. “Obtain Signatures” will then have the same Workflow Action options as before (Notify Vendor or Decline).
81. If “Notify Vendor” is selected:
82. Recipient **locates**, **opens**, and **accepts** the task
83. **Review** all information provided
84. **Enter** data for all red asterisked fields
85. **Select** “Send”



Action By: PM / PC / Planner

Example

- 86. Clicking send opens the Workflow Action Details
- 87. "Request SOV" is the only option. Notice is sent to the Contractor.
- 88. **Select "Send"**

- 89. Contractor **locates, opens, and accepts** the task
- 90. **Enter** the Cost Breakdown by clicking + icon
- 91. **Select** the CBS code.

Note: More than one CBS code may be allocated to a Cost Line Item.

CBS Picker

CBS Code	CBS Item
000-00-00 00 00	Construction - New
A10-00-00 00 00	Foundations
A10-00-99 99 99	Foundations
A10-10-03 30 10	Standard Foundations
A10-20-03 30 20	Special Foundations
A10-30-03 30 30	Slab on Grade

- 92. **Enter** the Amount

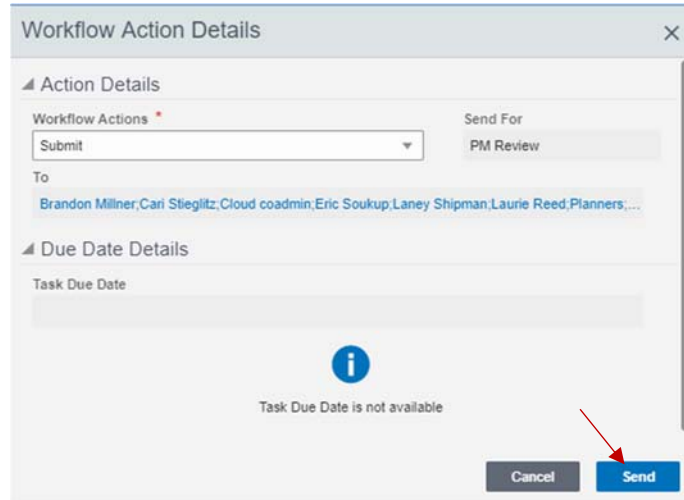
Note: Not Costed Amount must equal 0.00 for a Lump Sum entry.

- 93. **Select "Save"**
- 94. **Select "Send"**

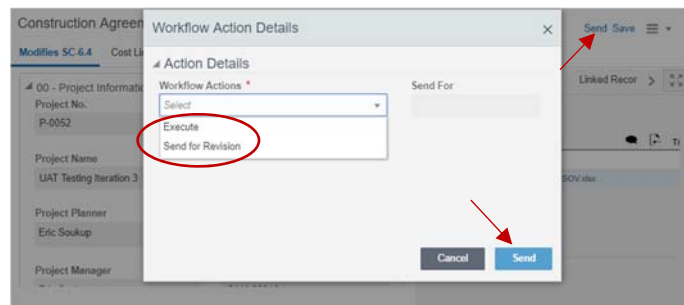
Action By: PM / PC / Planner

Example

- 95. Clicking send opens the Workflow Action Details
- 96. “Submit for PM Review” is the only option.
- 97. **Select** “Send”.



- 98. PM **locates, opens, and accepts** the task
- 99. PM **reviews** all data
- 100. **Select** “Send” in the upper right-hand corner of the record to open the Workflow Action Details.
- 101. **Select** “Execute” to complete the business process.
 - a. Optionally, **select** “Send for Revisions” to send the Business Process back to the “Request SOV” step
- 102. **Select** “Send” on Workflow Action Details



END TASK

3.4.6 MODIFYING A PROFESSIONAL AGREEMENT (UPDATED 02/26/2020)

Goals How to manage a professional agreement modification, including generating state forms.

Navigation Project>Change Management>Professional Agreement Modifications

Action By Project Manager / Planner

Pre-requisites Approved Professional Agreement

Related Files None.

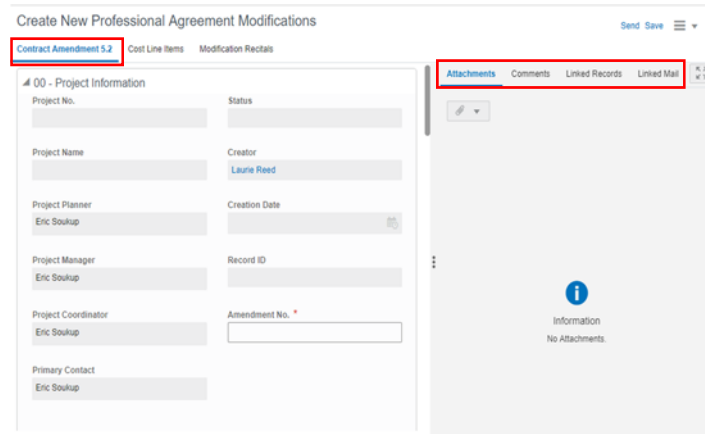
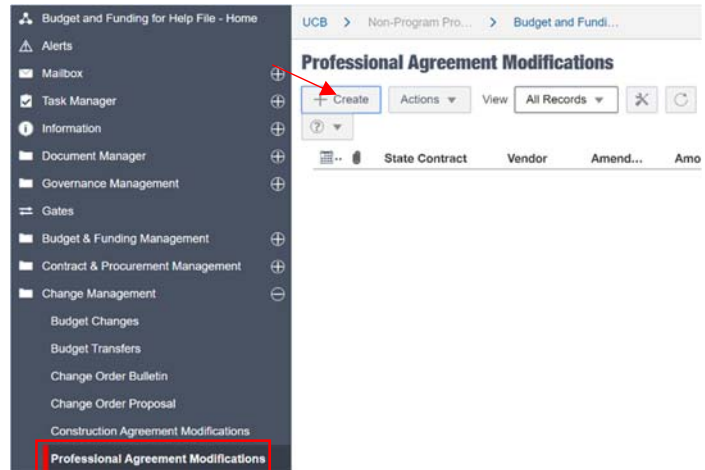
Action By: Project Manager / Planner

Example

1. **Navigate** to Project>Change Management>Professional Agreement Modifications
2. Select Create.
3. Selecting “Create” opens the modification available according to the project delivery shell template.

Note: There are workflow (WF) options for each type of agreement modification. Each agreement modification has similar but different required fields for data entry

4. Note the type of amendment is shown in the top left-hand corner.
5. Greyed fields will auto-populate as appropriate.
6. Enter data for red asterisked fields.
7. Attachment, Comments, etc. may be added using the buttons on the right-hand side.



Action By: Project Manager / Planner

Example

- 8. In 01 - Design Firm Information note Design Firm information will auto-populate based on the Original Contract selected below.
- 9. In 02 - Purpose of Amendment, explain the background of the amendment.

Note: Blocks 01 and 02 are consistent for all agreements, with slight field name variations accordingly.

▲ 01 - Design Firm Information

Design Firm Name	Firm Contact Name
<input type="text"/>	<input type="text"/>
Address 1	Firm Contact Title
<input type="text"/>	<input type="text"/>
Address 2	Firm Contact Email
<input type="text"/>	<input type="text"/>
Address 3	
<input type="text"/>	
City	
<input type="text"/>	
Zip/Postal Code	
<input type="text"/>	
State/Province	
<input type="text"/>	

▲ 02 - Purpose of Amendment

Purpose of Amendment *

- 10. In 03 - Contract Recitals:
- 11. Enter data for red asterisked fields. Greyed fields will auto-populate based on Contract/PO chosen
- 12. Amount of this Amendment is a sum of Cost Line Items

▲ 03 - Contract Recitals

Original Contract *

Purchase Order Number

Total Compensation (Fee)

0.00

Obligation to Pay (\$)

0.00

Action By: Project Manager / Planner

Example

Effective Date

Fixed Limit of Construction (\$)

Original Obligation to Pay (\$)

Previous Approved Amendments

Amount of this Amendment

Revised Obligation to Pay (\$)

Appropriated Funds (\$)

13. Note the Principal Representative.

04 - Principal Representative
Principal Representative *

14. Cost Line Items is accessed at the top of the page.

Create New Professional Agreement Modifications

Contract Amendment 5.2 Cost Line Items Modifications

No.	Cost Code	Code Name	Amount
0.00			

15. Select Add

16. Enter data for red asterisked fields

17. If an existing Line Item is Referenced, Short Description and Cost Code will auto-populate

18. Enter data for additional fields as appropriate

19. Select Save to save current entry

20. Select Cancel to cancel the current entry

21. Select Save & Add New to save current entry and add another.

Send Save

Line Item Details

00 - General

Reference

Short Description *

Cost Code *

Code Name

Amount *

Justification

Justification Description

0.00

Action By: Project Manager / Planner

Example

22. Modification Recitals is accessed at the top of the page.

23. Select Add

24. Enter data for red asterisked fields

Note: Standard recital language is provided in Section 5.

25. Select Cancel to cancel the current entry

26. Select Save to save current entry

27. Select Save & Add New to save current entry and add another.

28. Select Send to send the Business Process into the workflow. Select Save to save as a draft and complete later.

Create New Professional Agreement Modifications

Contract Amendment 5.2 Cost Line Items **Modifications**

☰ ☰ Add Actions ↕ ↻ 🗑️ 🔍 📄

No. 📄 Description Recital ...

Line Item Details

00 - General

Recital Sequence *

Description *

Cancel **Save** **Save & Add New**

Create New Professional Agreement Modifications **Send Save** ↕

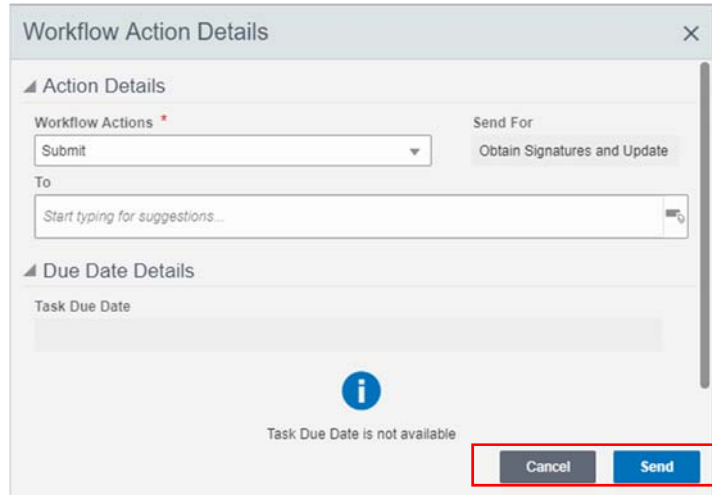
Contract Amendment 5.2 Cost Line Items Modifications

00 - Project Information | Attachments | Comments | Linked Records | Linked Mail

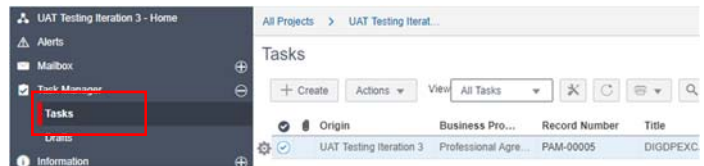
Action By: Project Manager / Planner

Example

- 29. Clicking send opens the Workflow Action Details
- 30. In this step Submit is the only option.
- 31. "To" field is User select and Recipient(s) must be selected.
- 32. Select Send to send for Obtain Signatures and Update



- 33. Recipient locates their Task and opens the record.



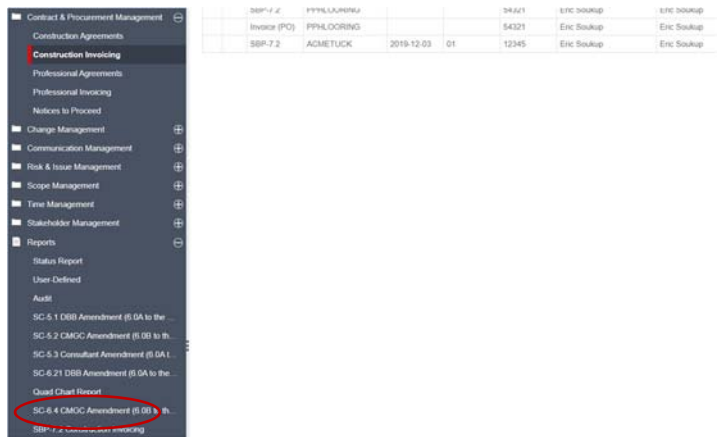
- 34. Select Accept to open the record.



- 35. Recipient locates, opens and accepts the task.

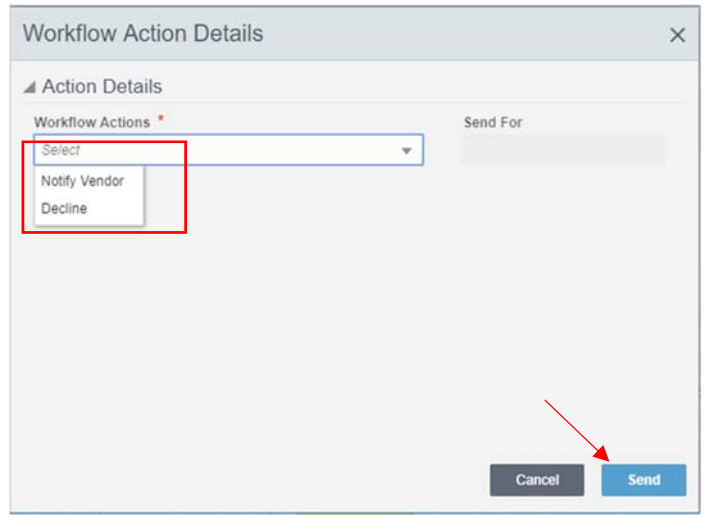
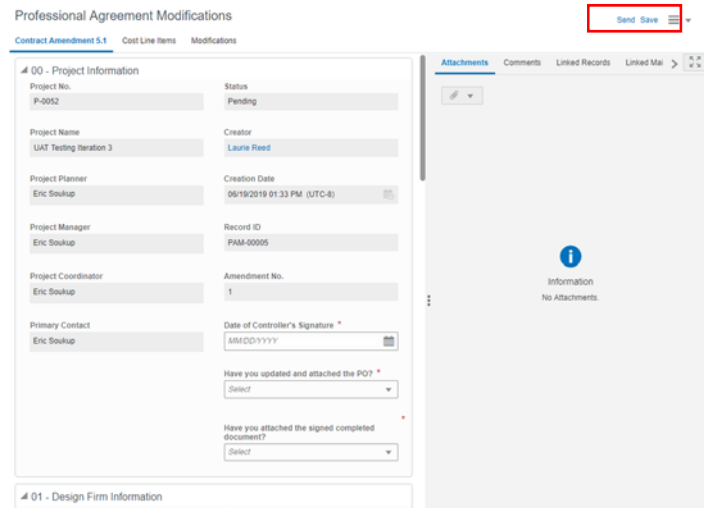
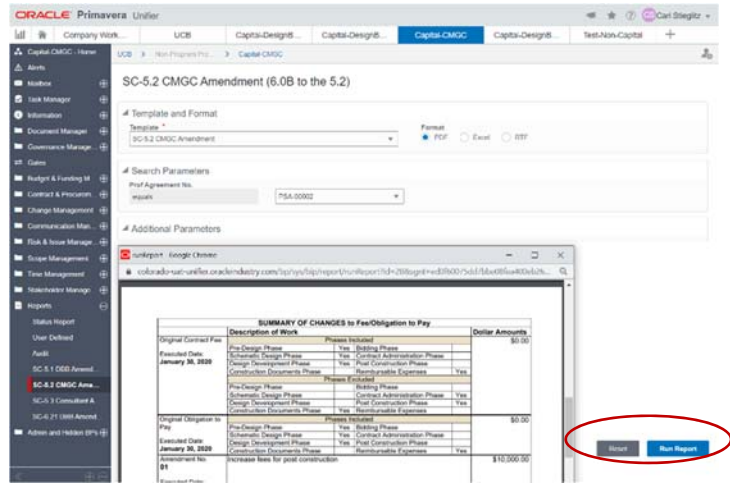
Note: In this step the PC will obtain signatures outside of Unifier and upload the executed agreement and purchase order to Unifier.

- 36. Note the Construction Agreement Number.
- 37. Navigate to Reports>SC-5.2 CMGC Amendment (6.0B to the 5.2) and selects to open the report screen.



Action By: Project Manager / Planner Example

38. **Ensure** the format is PDF.
39. Under Search Parameters, **select** the Professional Agreement Number.
40. **Select** “Run Report” to generate the PDF.
41. **Save** the PDF for upload into DocuSign.
42. **Route** agreement through DocuSign with applicable attachments and routing document.
43. **Wait** until all signatures are obtained in DocuSign.
44. **Update** PO in Marketplace.
45. **Return** to Unifier and open the modification task.
46. **Enter** data for red asterisked fields once known.
47. **Add** Attachment, Comments, etc. as necessary.
48. **Select** “Send” to open the Workflow Action Details screen.
49. **Select** “Notify Vendor” to send an email notification to the Vendor and any others CC’d. Note this is a terminal step for the Business Process.
 - a. Optionally, **select** “Decline” to send the Business Process to the Creator for revision. Best practice is to add Comments for the reason to Decline.
50. **Select** “Send”.

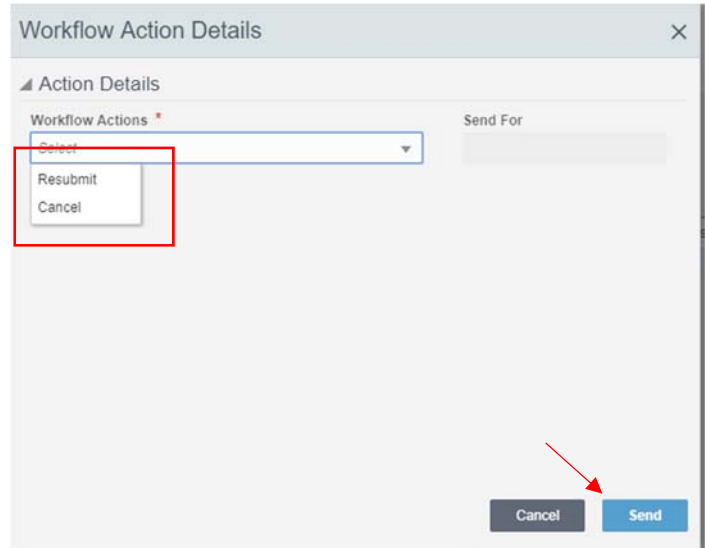


Action By: Project Manager / Planner

Example

51. If “Revision” is selected:

- a. Creator locates and Accepts the task.
- b. Reviews Comments provided and makes corrections as requested.
- c. Open Workflow Actions
- d. In this step the Creator has two Workflow options.
- e. Choosing Resubmit resends the Business Process to the Obtain Signatures and Update step.
- f. Choosing Cancel is a terminal step for the Business Process.
- g. Both Workflows will have a User select “To” field.
- h. Obtain Signatures will then have the same Workflow Action options as before (Notify Vendor or Decline).



END TASK

3.5 COMMUNICATION MANAGEMENT

3.5.0 INTRODUCTION

Communication happens throughout the project formally and informally. In our PDS system we have formalized some communications in order to capture information for reporting or tracking of “whose” court it is in.

Communication can be initiated at any point in the project.

3.5.1 CREATING AGENDAS AND MEETING MINUTES (UPDATED: 03/12/2020)

Goals How to create a meeting agenda and take meeting minutes. Minutes include capturing key decisions, taking notes and assigning action items.

Navigation Project>Communication Management>Meeting Minutes

Action By Project Team

Pre-requisites Discuss standard agenda content with the project team.

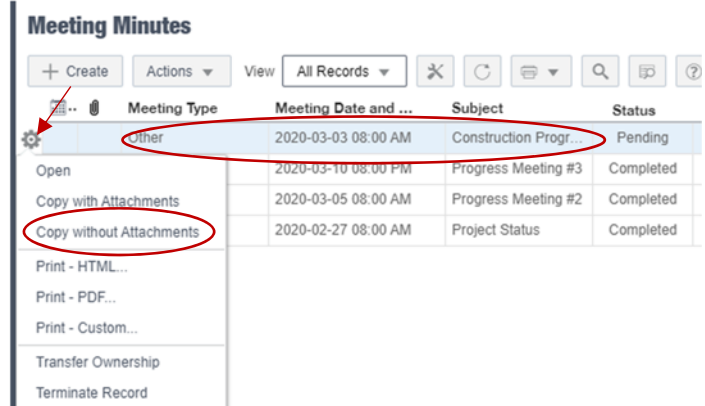
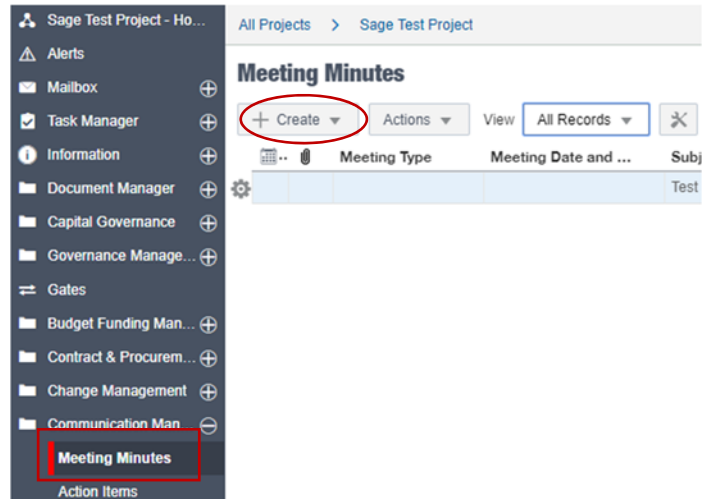
Related Files 3.5.2 Creating and Updating Action Items

Action By: Project Team Example

1. **Navigate** to Project>Communication Management>Meeting Minutes.
2. **Select** “Create”.

Note: Meeting agendas can be prepared in advance of the meeting. Workflow allows both an “Approve” and a “Document Meeting Results” output. If creating as an agenda, do not enter results until the actual meeting, or after the meeting. This file will assume you are creating the minutes in the meeting.

- a. Optionally, **copy** from the last meeting type.
- b. **Highlight** the meeting
- c. **Select** the Gear Icon to open the options window.
- d. **Select** “Copy without Attachments”.



Action By: Project Team

Example

- In 00 – Project Information tab, note greyed fields will auto-populate.

00 - Project Information

Project No.	Record ID
Project Name	Creator Laurie Reed
Project Planner Eric Soukup	Creation Date
Project Manager Eric Soukup	Status
Project Coordinator Eric Soukup	
Primary Contact Eric Soukup	

- In 01 - Meeting Details, **enter** data for red asterisked fields.

01 - Meeting Details

Subject * Meeting Title	Meeting Date and Start Time * 04/17/2019 01:00 PM (UTC-8)
Meeting Coordinator Laney Shipman	Meeting Type * Pre-Construction

- In 02 – Meeting Location Details, **enter** data for red asterisk fields.
Note: It is a good idea to fill in the location information as it can be used for future meetings when copied.

02 - Meeting Location Details

Meeting Location Name * On Site	City Boulder
Address Construction Ave	State/Province CO
Zip 11100	

- In 03 – Summary, **enter** the meeting purpose.

03 - Summary

Purpose
Construction Coordination with Project Stakeholders

- Select** “Business Items” at the top of the window.
- Select** “Add”.

Create New Meeting Minutes

Meeting Minutes **Business Items** Related Issues Attendees

Add Actions

No.	Item Name / Description	Repeatin...	Further Actio...	Assigned To
-----	-------------------------	-------------	------------------	-------------

Action By: Project Team

Example

9. In 00 - Business Item Detail, **enter** agenda items.
10. **Select** a “Business Item Type” as either a One Time Item or a Standard Agenda item.

Note: Selecting Standard Agenda Item carries it over to the next meeting.

11. After or during the meeting, enter the outcome in 01 - Meeting Conclusion Details.
12. If the item was a key decision, **change** to “Yes”.



▲ 00 - Business Item Details

Name / Title *

Introductions

Details

Intros

Business Item Type *

One Time Item

Item #

1

▲ 01 - Meeting Conclusion Details

At the completion of the meeting the following was concluded about this business item. Set the key decision field to “Yes” if this represents a key decision to be reported in the decision log report.

Notes/Resolution

Project Directory to be created by [GC](#)

Key Decision?

No

Action By: Project Team

Example

13. Under 02 - Follow Up Action Required, if there is additional action, **complete** this section.
14. **Enter** Data for red asterisked fields
 - a. If Further Action Required is Yes, then an Action Item is auto created. (See Help File 3.5.2 Creating and Updating Action Items)
15. **Enter** the description of the action item needed.
16. **Select** the due date of the action item.
17. **Select** the Unifier user that the action item will be assigned to.
 - a. If the actual person responsible is not a Unifier user, select External Assignee as “Yes”.
18. **Enter** the Ext. Company Name.
19. **Enter** the name of the actual person responsible for completing the task.
20. **Select** the priority.
21. **Select** the action item approver.

02 - Follow Up Action Required

If at the conclusion of the meeting further action is necessary, the details below are applicable. Note, if external assignee is involved, a Unifier assignee is then required too, as this person will be the one responsible for completing the action within Unifier (on behalf of the external assignee).

Further Action Required?
Yes

Description *
GC distribute to all Project Stakeholders

Due Date
05/04/2019

Assigned To *
Laurie Reed

Company
University of Colorado

External Assignee?
Yes

Ext. Company name *
GC

External Assignee Name *
BettyBuilder

Brief Description
Action Item

Priority
High

Action Item Approver *
Laurie Reed

Action By: Project Team

Example

- 22. If further action is required, note 03 - Resolution Details & 04 – Other Information, these fields are for tracking Action Items only.
- 23. **Enter** “Line Item Status” as Pending.
- 24. **Select** “Save”.
- 25. Optionally, **select** “Save & Add New” if there are more agenda or meeting line items to add.

03 - Resolution Details

The fields below will be auto-populated from the associated action item record, if one exists for the business item. Action Item Record # and Action Item Status are read only, and are only populated with values if an Action Item record is related to the Business Item.

Brief Summary of Actions Taken

Start Date

Action Item Complete Date

Action Item Status

04 - Other Information

Short Description
Introductions

Line Item Status
Pending

Cancel Save Save & Add New

- 26. If issues arise during the meeting, **select** “Related Issues” at the top of the window.
- 27. **Select** “Add”.

Note: Issues should be added if they impact scope, schedule or budget.

Create New Meeting Minutes

Meeting Minutes Business Items Related Issues Attendees

Add Actions

No. Selected Issu... Create New? Title

Action By: Project Team

Example

28. **Change** “Create new issue?” to yes.

Note: Per Instructions, existing risks & issues will be available for selection, or Creating a new issue will auto-create a new risk & issue. (See Help File 3.6.1 Managing Risks & Issues)

29. Optionally, if the issue already exists, **select** the issue from the picker.

30. **Enter** data for red asterisk fields

31. **Select** “Save”.

32. Optionally **select** “Save & Add New” to add more line items.

Instructions

Either select from an existing issue, which will then auto-populate the issue title and details fields, or, you can create a new issue by checking the create new issue box, and then entering in the issue details.

Selected Issue #


Create new issue? *

Brief Description *

Risk Category *

Description *

New Issue Record #



Action By: Project Team

Example

33. Select “Attendees” at the top of the window.

34. **Select** “Add”.

35. In 00 – Invited Attendee Information, add invitees and if they attended.

If the invited attendee is already in the system, a new window will open for you to select the attendee.

36. **Enter** other invited attendees, not already in the system and other fields as known.

37. **Select** “Save”.

38. Optionally, **select** “Save & Add New” to enter more items.

The screenshot shows the 'Create New Meeting Minutes' application interface. At the top, there are tabs for 'Meeting Minutes', 'Business Items', 'Related Issues', and 'Attendees'. The 'Attendees' tab is selected and circled in red. Below the tabs is a toolbar with an 'Add' button circled in red. Below the toolbar is a table header with columns: 'No.', 'Attendee Name', 'Title', and 'Company'. Below the table header is a 'Line Item Details' form for '00 - Invited Attendee Information'. The form contains the following fields: 'Invited Attendee (selector)' with a dropdown menu containing 'Type a Name...'; 'In Attendance?' with a dropdown menu set to 'Yes'; 'Include in next meeting?' with a dropdown menu set to 'Yes'; 'Attendee Name' with a text input field containing 'Betty Builder'; 'Mobile Phone' with a text input field containing '5678901234'; 'Work Phone' with a text input field containing '8901234567'; and 'Short Description *' with a text input field containing 'Required attendance'. At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Add New'. The 'Save' and 'Save & Add New' buttons are circled in red.

Action By: Project Team

Example

39. **Select** “Send” to open the Workflow Action Details screen.

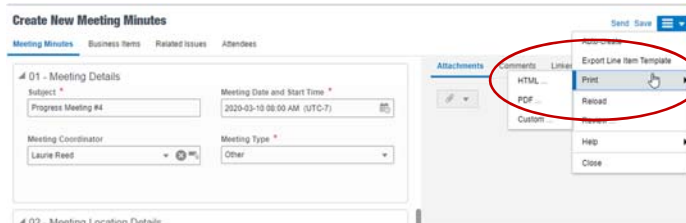
- a. Optionally, **select** “Save” to create a draft to complete later.



40. To email the agenda or meeting minutes out, including non-Unifier users, **select** “Print” from the drop-down menu.

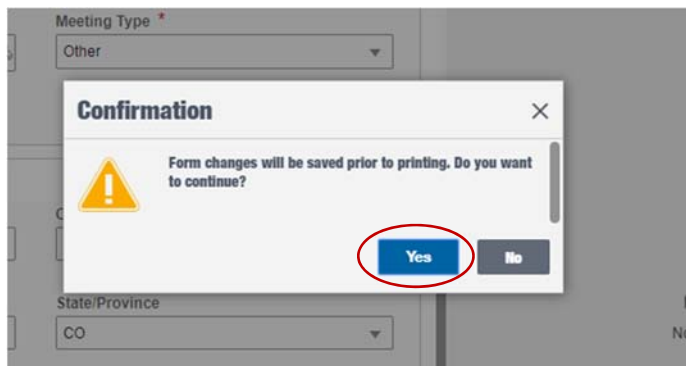
41. Select “PDF” or “HTML”

Note: HTML will give you a more User-friendly format. “Custom” is not an option in this instance.



42. **Selecting** your format will display this window.

43. **Select** “Yes”.



Action By: Project Team

Example

- 44. In “Print Options” **uncheck** the “Workflow Progress” box.
- 45. **Select** “Print”.

The screenshot shows a 'Print Options' dialog box with the following settings:

- Show:
 - Show All:
 - Upper Form:
 - Workflow Progress: (circled in red)
 - All Steps:
 - Visited Steps:
- Sort By:
 - Completion ...: [Dropdown]
 - Ascending: [Dropdown]
- Line Item List:
- General Comments:
- Record Attachments:
- Comments:
- Line item detail Form:
- Attachments:
- Comments:

Buttons: Cancel, Print (indicated by a red arrow).

- 46. **Manipulate** page to display all you need for your meeting agenda.
- 47. **Select** “Print”.
- 48. **Save** as a PDF for emailing agenda to attendees.

Note: This may also be done to send out meeting minutes after the record has been final edited and approved.

The screenshot shows the 'Meeting Minutes' page with the following sections:

- 00 - Project Information: Project Number, Project Name, Project Manager, Project Coordinator, Primary Contact, Status, Creator, Creation Date, Record ID.
- 01 - Meeting Dates: Subject, Meeting Location Name, Meeting Date and Start Time, Meeting Type.
- 02 - Meeting Location Details: Meeting Location Name, Address, City, State/Province, ZIP.
- 03 - Summary: Purpose.
- 04 - Business Items: Table with columns for Item #, Item Name, Description, Preceding Item, Further Action Required, Assigned To, Start Date, Due Date, Complete Date, Action Item Status.
- 05 - Related Issues: Table with columns for Issue #, Issue Name, Title, Item Category, Description.

- 49. If the steps above were for creating the Agenda only, wait until the meeting occurs.
- 50. During or after the meeting, recipient **accept** the task to edit.
- 51. **Update** all line items with most recent information.
- 52. If needed, Recipient can add new relevant information that were not included by the Creator in the editable fields at the top of the window.

The screenshot shows the 'Meeting Minutes' page with the 'Business Items' tab selected. The 'Print' button in the top right corner is circled in red. The page displays project information and a list of business items.

Action By: Project Team

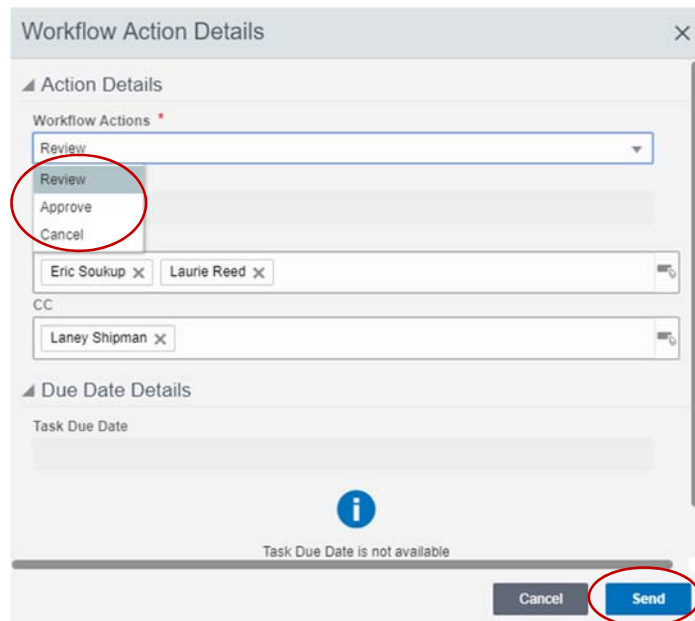
Example

53. **Select** “Send” to open the Workflow Action Details screen.

54. **Select** “Approve” to complete the meeting minutes.

- a. Optionally, **select** “Review” if more review is need.
- b. Optionally, **select** “Cancel” to cancel the minutes without issuing or approving them.

55. **Select** “Send”



END TASK

3.5.2 CREATING AND UPDATING ACTION ITEMS (UPDATED: 10/24/19)

Goals How to view, edit and reassign action items. Includes updating the progress of the action item on a weekly basis.

Navigation Project>Communication Management>Action Items

Action By Project Team

Pre-requisites None.

Related Files 3.5.1 CREATING AGENDAS AND MEETING MINUTES

Action By: Project Team

Example

1. **Navigate** to Project>Communication Management>Action Items.

2. **Select** “Create”.

Note: If another process or individual assigns you an action item, you will be notified via tasks and skip to Step 13.

3. In 00 – Project Information note greyed fields will auto-populate as appropriate.

Assigned To	Brief Description	Pri
Eric Soukup	Test	Hi
AriAnne Gilliland	Make me coffee (please)	
Eric Soukup	Test	
Eric Soukup	Test	
Eric Soukup	Test Planning	
Diana Kennedy	Deliver Crack Cookies ...	

00 - Project Information

Project No.	Status
<input type="text"/>	<input type="text"/>
Project Name	Creator
<input type="text"/>	Laurie Reed
Project Planner	Creation Date
Eric Soukup	<input type="text"/>
Project Manager	Record ID
Eric Soukup	<input type="text"/>
Project Coordinator	
Eric Soukup	
Primary Contact	
Eric Soukup	

Action By: Project Team

Example

4. In 01 - Action Item Information, **enter** information.
5. **Enter** data for red asterisk fields.
6. **Enter** “Assigned To” as the person who will be completing the Action Item.
7. **Enter** “Action Item Approver” as the person who will final review the Action was completed by the “Assigned To”.
8. **Mark** “External Assignee” as yes, if the person assigned is not a Unifier user. Note that the “Assigned To” will still be responsible for ensuring the task is complete and updating it in the system.
9. In 02 – Additional Details, **enter** the work that needs to be done. Enter notes/resolution as a recommended path to be confirmed by the assignee.
10. In 03 –Details on Action Taken, note greyed fields will be populated later in the workflow.
11. In 03 – Related Business Processes, note greyed fields only be populated if the Action Item is populated from another BP (Meeting Minutes or Punch List).

01 - Action Item Information

Brief Description *

Assigned To *

Priority *

External Assignee?

Start Date

External Assignee Name *

Action Item Complete Date

Ext. Company name *

Action Item Approver Email

E-Mail

Action Item Approver *

02 - Additional Details

Description

Notes/Resolution

03 - Details on Action Taken

Brief Summary of Actions Taken

04 - Related Business Processes

Action Item Type

Punch List Record #

Meeting Number

Punch List Line Item

Meeting Minutes Line Item

Action By: Project Team

Example

12. In 04–Related Business Processes, if the action item was created by another process, note example to the right shows it populated.

04 - Related Business Processes

Action Item Type Meeting Minutes	Punch List Record #
Meeting Number MM-000003	Punch List Line Item 0
Meeting Minutes Line Item Agenda Item #1	

13. **Select** “Send” to open the Workflow Action Details screen.

Create New Action Items

Action Item Send Save

14. Optionally **select** “Save” to save as a Draft to complete later.

15. In the Workflow Action Details screen, note “Submit” is the only option.

Workflow Action Details

Action Details

Workflow Actions *

Submit

Send For

Action

To

Eric Soukup;All Project Users

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

16. **Select** “Send”.

17. Action Item is sent to the Assignee for Action.

Action Items

Action Item Assign Item

Attachments Comments Linked Records Linked Mail

18. Assignee receives notification of a new Action Item and will **locate** the Action Item in their Tasks.

19. **Open** Action Item and **select** “Accept”.

Action By: Project Team

Example

- 20. In 01 – Action Item Information, note some fields remain editable to allow the Assignee to Re-assign to someone else.
- 21. When an Action is re-assigned, the “Assigned To” field must be changed to the new assignee.

01 - Action Item Information

Brief Description
Go to Work

Assigned To
Laurie Reed

Priority
High

External Assignee?
Yes

Start Date
04/23/2019

External Assignee Name *
Laurie Reed

Action Item Complete Date

Ext. Company name *
Lazy Bones Decorating

Action Item Approver Email
laurie.reed@sagemethod.com

E-Mail
laurie.reed@sagemethod.com

Action Item Approver
Laurie Reed

- 22. In 03 – Details on Action Taken, **enter** the action taken prior to moving to the next step in the workflow.
- 23. **Select** “Send” to open the Workflow Action Details screen.
- 24. Optionally, **select** “Save” to save as a Draft to complete later.

03 - Details on Action Taken

Brief Summary of Actions Taken *

I will re-assign to our site superintendent

- 25. In the Workflow Action Details screen:
- 26. **Select** “Review: to send the Business Process to the Review Step.
- 27. Optionally, **select** Reassign to send the Business Process to the Assignee and remains in the Action Step. The system will automatically define the “To” based on the User selected “Assigned To” field.

Note: If Reassigning, you must change “Assigned To” field in 01- Action Item Information Block first.

- 28. **Select** “Send”.

Workflow Action Details

Action Details

Workflow Actions *
Review

Review
Reassign

To
Laurie Reed, All Project Users

Due Date Details

Task Due Date

Task Due Date is not available

Cancel Send

Action By: Project Team

Example

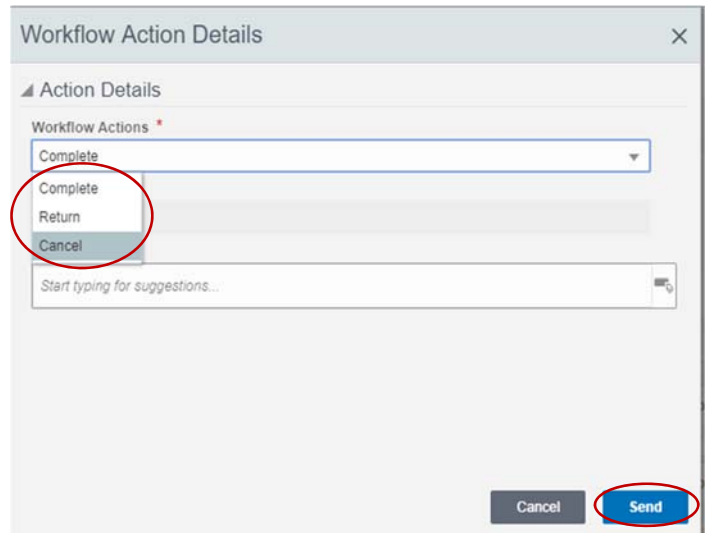
29. Assignee will receive notification of the Action Item and **locate** it in their Tasks



30. **Select** “Accept” to start reviewing the task.

Note: No fields are editable at this step. Only review is possible.

31. After review is done, **select** “Send” to open the Workflow Action Details screen.



32. **Select** “Complete” to finish the Action Item. Note this is a terminal end to the Business Process.

- a. Optionally, **select** “Return” to send the Business Process back to Assigned To person.
- b. Optionally, **select** “Cancel” to end the Action Item without completing.

33. **Select** “Send”.

END TASK

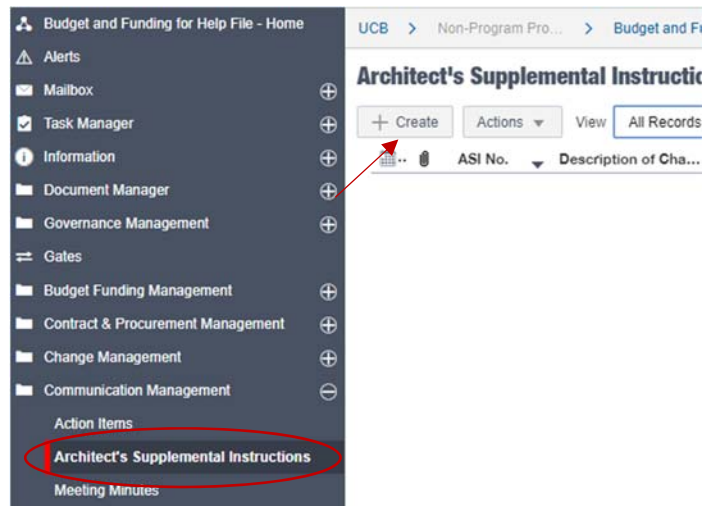
3.5.3 COMPLETING ASI'S (UPDATED 03/04/2020)

- Goals** How to complete Architect Supplemental Instructions (ASI).
- Navigation** Project>Communication Management>Architect Supplemental Instructions
- Action By** Project Manager / Project Coordinator / Planner / AE
- Pre-requisites** Construction Documents
- Related Files** Construction Documents

Action By: PM / PC / Planner / AE

Example

1. Navigate to Project>Communication Management> Architect Supplemental Instructions.
2. Select "Create".



3. Fill in data for red asterisked field. ASI number should be sequential
4. Note: Greyed fields will auto-populate as appropriate

The image shows a screenshot of a form titled "00 - Project Information". The form contains several fields for project details. The "Project Number" field is filled with "UCB000067". The "Project Name" field is filled with "Budget and Funding for Help File". The "Project Planner" field is filled with "Eric Soukup". The "Project Manager" field is filled with "Eric Soukup". The "Project Coordinator" field is filled with "Eric Soukup". The "Primary Contact" field is empty. The "Status" field is empty. The "Creator" field is filled with "Laurie Reed". The "Creation Date" field is empty. The "Record ID" field is empty. The "Design Firm ASI Ref." field is empty. The "ASI No." field is marked with a red asterisk, indicating it is a required field.

Action By: PM / PC / Planner / AE

Example

- 5. Enter data for red asterisked fields
- 6. Enter additional data as appropriate

Note: Selecting a “Design Firm Name” will auto populate other design contact fields.

01 - Vendor Information

Contractor Name <input type="text" value="Type a Vendor Name..."/>	Design Firm Name * <input type="text" value="Type a Vendor Name..."/>
Contractor Contact Name <input type="text"/>	Firm Contact Name * <input type="text"/>
Contractor Contact Title <input type="text"/>	Firm Contact Title * <input type="text"/>
Contractor Contact Email <input type="text"/>	Firm Contact Email * <input type="text"/>

- 7. Enter data for red asterisked fields
- 8. Enter additional data as appropriate

02 - ASI Details

Instructions
This ASI is NOT an authorization to proceed.

Potential Cost Impact *

Potential Schedule Impact *

Code Impact? *

Description of Change/Work *

Drawing Sheet(s) No.

Drawing Sheet(s) Notes

Action By: PM / PC / Planner / AE

Example

02- ASI Details continued

Drawing Sheet(s) Notes

Specification Section

Type a Specification Section Number...

Specification Section(s) Notes

Status of Existing Work

Have you attached all associated documents? (if NA, select Yes) *

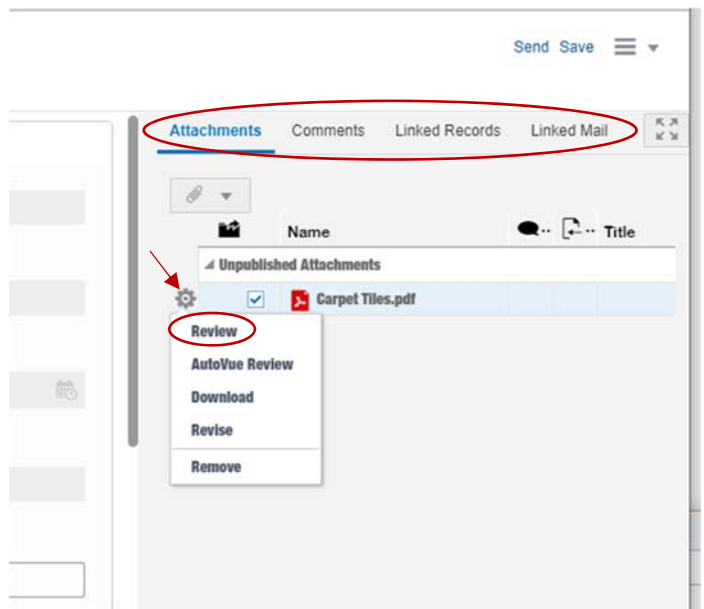
Select

9. Attachments, Comments, etc. can be added in the right-hand view.

Note: this can be done in any step

10. Attachments may be annotated by clicking the gear icon then selecting "Review".

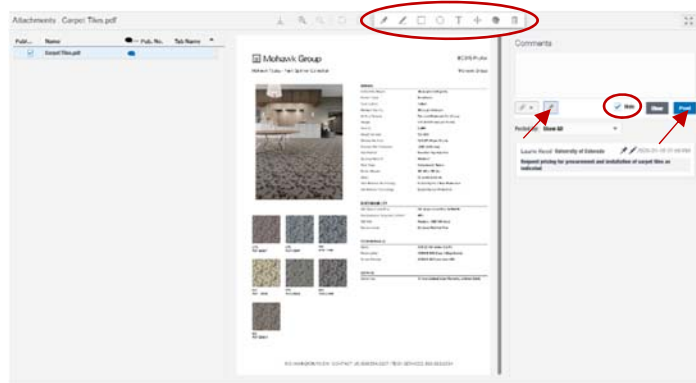
Note: Never select "AutoVue Review.



Action By: PM / PC / Planner / AE

Example

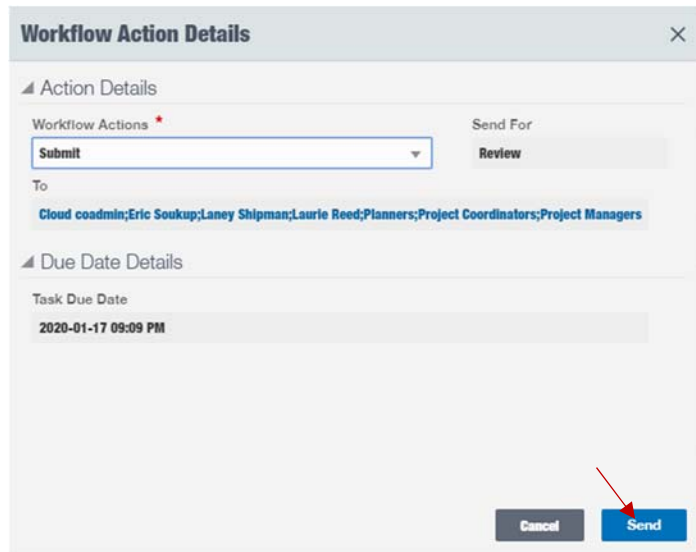
11. **Review** window opens displaying selected file attachment.
 12. **Clicking** the push pin in the Comments window opens the annotation tool bar.
 13. **Enter** annotations and associated comments.
 14. **Uncheck** the “Hide” box.
 15. **Select** “Post”
- Note: All annotations and comments are located on the right-hand side.



16. Select “Send” or “Save”
- Note: Need to close the Review screen to get back to this “Send or Save” option.



17. Clicking Send opens Workflow Action Details screen
18. In this step submit is the only option.
19. Select “Send”. ASI is sent for review.



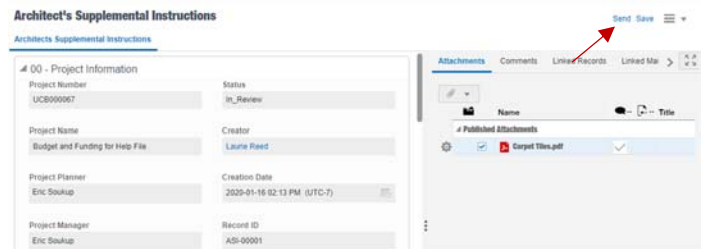
20. Reviewer accepts to open the record.



Action By: PM / PC / Planner / AE

Example

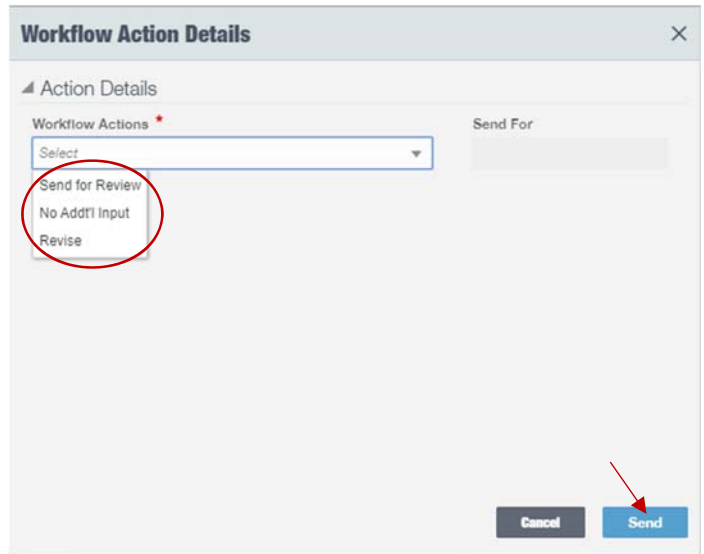
21. All information is reviewed
 - a. Attachments, Comments, etc. can be added as appropriate
22. **Select** “Send”



23. **Select** “Send for Review” to send the ASI for Review and Comment. Reviewer selects recipient(s).

Note: If more than one Reviewer, all recipients must respond before the ASI can progress.

- a. Optionally, **select** “No Additional Comments” sends the ASI for Comments Response
- b. Optionally, **select** “Revise” sends the ASI to Revisions. Revisions step can cancel the ASI or revise and resubmit to Review step.



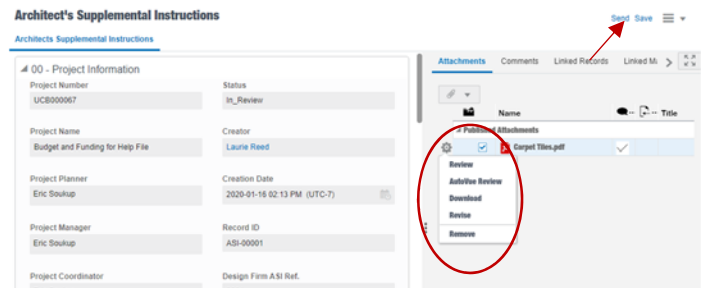
24. Select “Send”.

25. Reviewer(s) locates, open, and accepts the task

26. All information is reviewed

Note: Reviewer(s) can review attachment annotations and comments or add their own by accessing “Review” in the gear icon drop down. Additional attachments can be entered as well. Refer to steps 10 through 15.

27. Select “Send” or “Save”



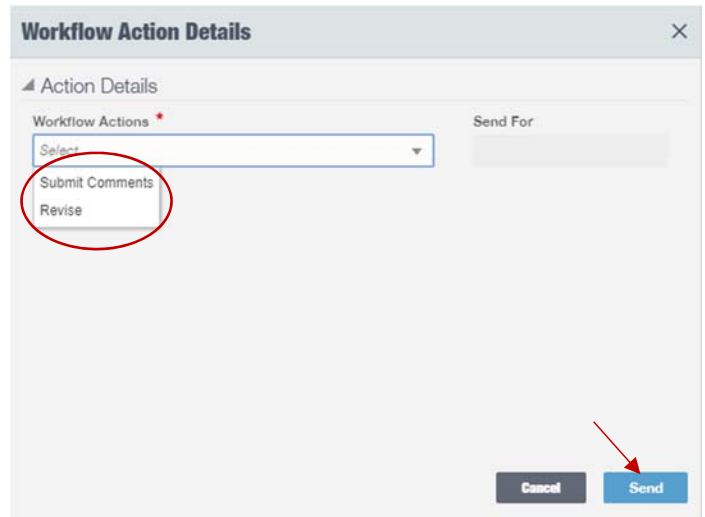
Action By: PM / PC / Planner / AE

Example

28. **Select** “Submit Comments” to send the ASI for Comments Response.

- a. Optionally **select** “Revise” to send the ASI back to the Creator for revision and resubmit, or the Creator may cancel the ASI.

29. **Select** “Send”.



30. Reviewer(s) locates, open, and accepts the task

31. All information is reviewed

32. Attachments, Comments, etc. can be added as appropriate

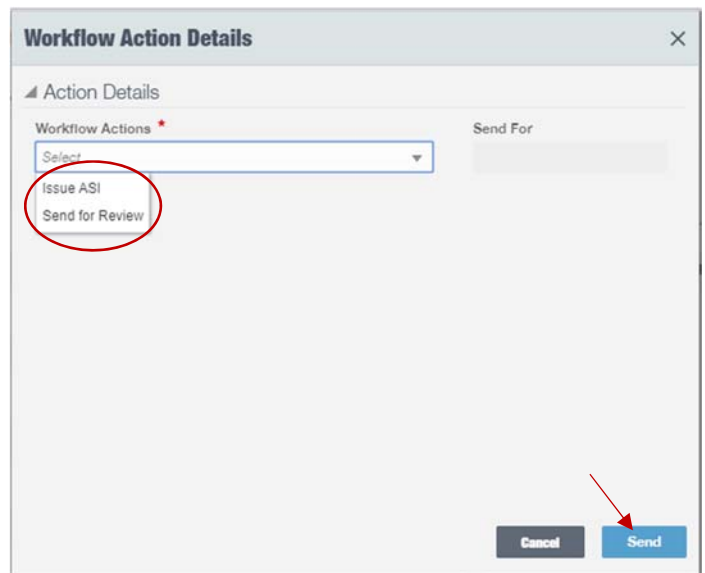
33. Select “Send”.



34. **Select** “Issue ASI” to complete the business process.

- a. Optionally, **select** “Send for Review” to send the ASI to Review and Comment workflow step.

35. **Select** “Send”



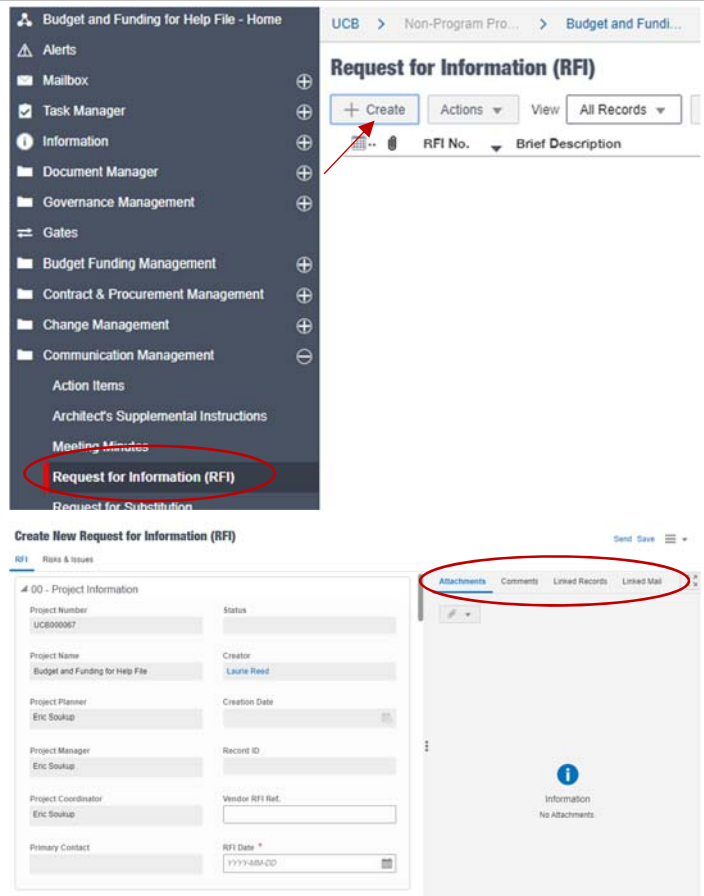
END TASK

3.5.4 SUBMITTING A REQUEST FOR INFORMATION (UPDATED 01/09/2020)

- Goals** How to submit a Request for Information (RFI) and manage the response.
- Navigation** Project>Communication Management>Request for Information
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner / Contractor
- Pre-requisites** Construction Documents / Construction Agreement
- Related Files** Construction Documents

Action By: PM / PC / Planner / Contractor **Example**

1. **Navigate** to Project>Communication Management>Request for Information.
2. **Select** "Create".
3. In 00 – Project Information **note** greyed fields will auto-populate as appropriate.
4. **Enter** data for red asterisked field.
5. Attachment, Comments, etc. may be added using the buttons on the right-hand side.



Action By: PM / PC / Planner / Contractor

Example

6. In 01 – Vendor Information, **enter** information.
7. **Enter** data for red asterisk fields.
8. Choosing Contractor and Design Firm from the drop down or Select button, auto-populates some of the red asterisk fields.
9. Fill in other fields as applicable.

01 - Vendor Information

Contractor Name *	Design Firm Name *
<input type="text" value="Type a Vendor Name..."/>	<input type="text" value="Type a Vendor Name..."/>
Contractor Contact Name *	Firm Contact Name *
<input type="text"/>	<input type="text"/>
Contractor Contact Title *	Firm Contact Title *
<input type="text"/>	<input type="text"/>
Contractor Contact Email *	Firm Contact Email *
<input type="text"/>	<input type="text"/>
Subcontractor Name	
<input type="text"/>	
Subcontractor Contact Name	
<input type="text"/>	
Subcontractor Contact Title	
<input type="text"/>	
Subcontractor Contact Email	
<input type="text"/>	

10. In 02 – RFI Question
11. Enter data for red asterisk field.
12. Enter Proposed Solution as applicable.

02 - RFI Question

Question *

Proposed Solution

Action By: PM / PC / Planner / Contractor

Example

13. In 03 –RFI Information, **enter** data for red asterisked fields.

14. **Enter** data for other fields as applicable.
- a. Source is the where the RFI came from.
 - b. Affected area is the location for the RFI.
 - c. Discipline can be multi-select if needed.

Note: Specification Section options will be available when a Specifications Section Business Process is completed for the project.

Note: Block 04 information is meant for Owner. Cannot enter a risk here, can only select one already entered under Risks and Issues. The Contractor will not be able to enter a risk.

03 - RFI Information

Brief Description *

Required Date *

Source

Affected Area

Discipline

Drawing Sheet(s) No.

Drawing Sheet(s) Notes

Specification Section

Specification Section(s) Notes

Have you attached all associated documents? (if NA, select Yes) *

15. Attachments can be annotated by clicking the gear icon.

Attachments

Name	Title
4 Unpublished Attachments	
Easy Oven Baked Pale...	

Action By: PM / PC / Planner / Contractor

Example

- 16. In 04–Cost & Schedule Information and 05 – Answer Details
- 17. **Enter** data from drop down as known.
Note: Greyed fields will auto-populate as appropriate

- 18. **Select** “Send” to open the Workflow Action Details screen.
- 19. Optionally **select** “Save” to save as a Draft to complete later.

- 20. In the Workflow Action Details screen, note “Submit” is the only option.
- 21. **Select** “Send”.
- 22. RFI is sent for Review.

Note: The task due date is auto-assigned to five days (excluding holidays and weekends). If you need an expedited review, contact the reviewers independently. The RFI will move to the next step as soon as all responses are received.

Action By: PM / PC / Planner / Contractor

Example

23. In this view, Reviewer can reference an existing record or create a new RFI record by clicking the “tool” icon and Copy>Without Attachments.



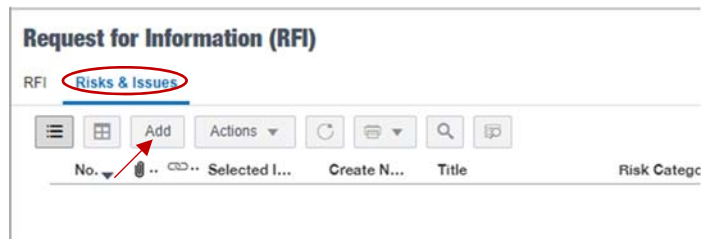
24. Reviewer receives notification of a new RFI and will **locate** the RFI in their Tasks.



25. **Open** RFI and **select** “Accept”.

26. Review all information provided.

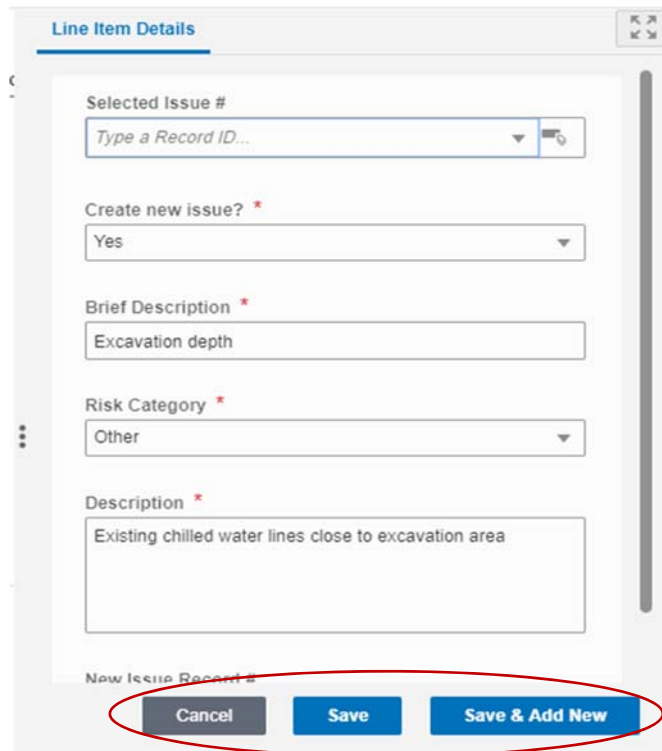
27. Risks & Issues may be added in this step by accessing the tab at the top of the window.



Note: Adding Risks & Issues is not available in the Create step.

28. **Select** “Add”.

29. Chose an existing record from the selection window, or enter data for the red asterisked fields to create a new record.



30. Select “Save”.

31. **Select** “Cancel” cancels the current entry.

Action By: PM / PC / Planner / Contractor

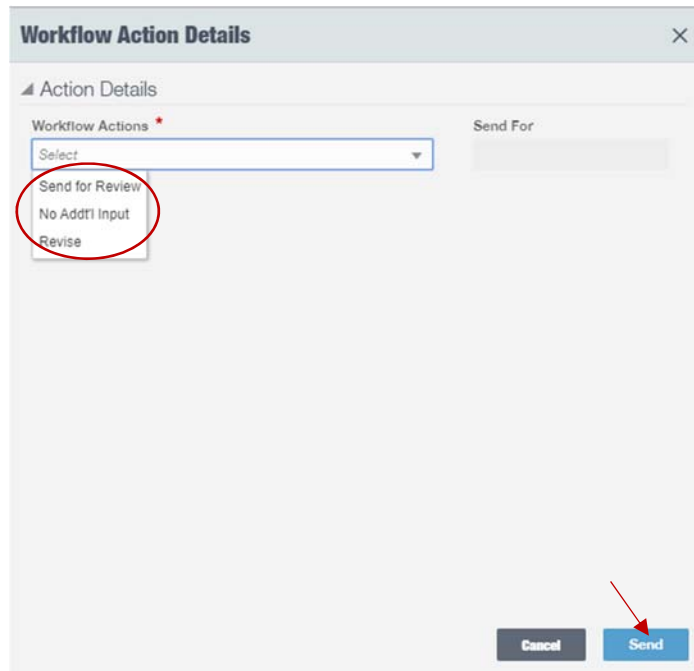
Example

32. Reviewer clicks “Send” or “Save”.



33. Reviewer chooses the appropriate workflow action:

- a. “Send for Review” sends the RFI for Review and Comment. Reviewer selects recipient(s). If more than one Reviewer, all recipients must respond. Review and Comment can forward for Comment Response or send for Revision.
- b. If sent for Revision at this step, the RFI can be canceled or sent back for Revise by the Creator.
- c. “No Addt’l Input” sends the RFI for Comments Response. This sends the RFI to the Response step.
- d. “Revise” sends the RFI back to the Creator for revision and resubmit.



34. **Select** “Send”.

35. In “Comments Response” Responder **select** “Accept” to activate.

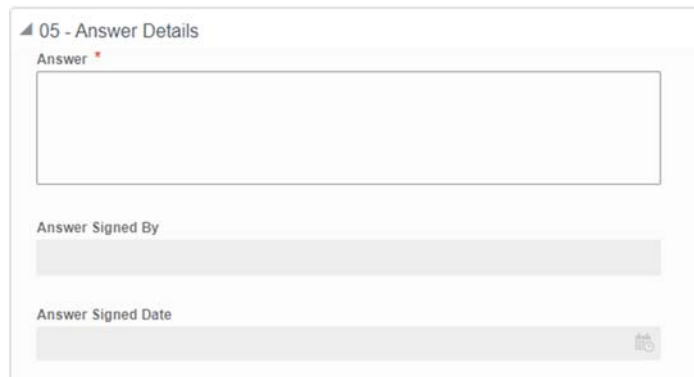


36. **Review** all information.

Note: Only section 05-Answer Details is editable.

37. Responder must issue a response in the red asterisked block.

- a. Greyed fields will auto populate when response is sent.



Action By: PM / PC / Planner / Contractor

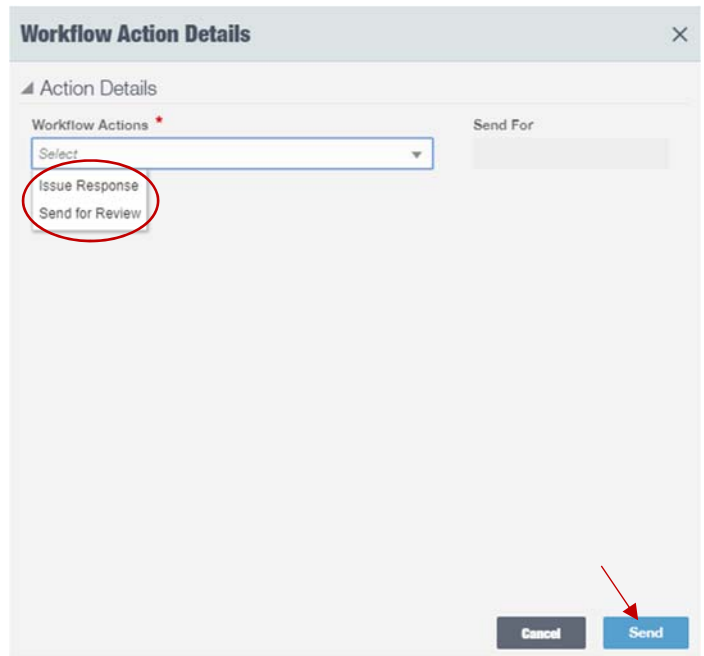
Example

38. **Select** “Send” to open the Workflow Action Details screen.



39. Responder chooses the appropriate workflow action.

- a. “Issue Response” sends the RFI to Acknowledge. A Recipient must be selected.
- b. “Send for Review” send the RFI to the Review and Comment. A Recipient must be selected.



40. **Select** “Send”

41. **Select** “Accept” to activate



42. **Review** all information

43. **Select** “Send” to open the Workflow Action Details screen.



Action By: PM / PC / Planner / Contractor

Example

44. Note in this step “Acknowledge” is the only option and is pre-selected.

Note: Acknowledge must occur. If a revision is required, or the creator has an issue with the response, a new RFI must be submitted.

- a. This is a terminal end the business process.

45. **Select** “Send”.

The screenshot shows a 'Workflow Action Details' dialog box. Under the 'Action Details' section, there is a 'Workflow Actions' dropdown menu with 'Acknowledge' selected. Below this, the 'End' option is visible. The 'CC' field is empty with the placeholder text 'Start typing for suggestions...'. At the bottom right, there are 'Cancel' and 'Send' buttons, with a red arrow pointing to the 'Send' button.

END TASK

3.5.5 SUBMITTING A REQUEST FOR SUBSTITUTION (UPDATED 03/04/2020)

- Goals** How to submit a Request for Substitution (RFI) and manage the response.
- Navigation** Project>Communication Management>Request for Substitution
- Action By** Contractor / Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Construction Documents
- Related Files** Construction Documents / Substitution Request Back-up

Action By: Contractor / PM / PC / Planner

Example

1. **Navigate** to Project>Communication Management>Request for Substitution.
2. **Select** “Create”.
3. In 00 – Project Information **note** greyed fields will auto-populate as appropriate.

The screenshot displays the 'Request for Substitution' web application. On the left, a navigation sidebar lists various system functions, with 'Request for Substitution' highlighted by a red circle. The main interface shows a header with the title 'Request for Substitution' and a '+ Create' button, which is pointed to by a red arrow. Below the header, there are fields for 'Brief Description', 'Spec No.', and 'Spec Name'. The '00 - Project Information' section is expanded, showing a form with the following fields and values:

Field	Value
Project No.	[Greyed out]
Status	[Greyed out]
Project Name	[Greyed out]
Creator	Laurie Reed
Project Planner	Eric Soukup
Creation Date	[Greyed out]
Project Manager	Eric Soukup
Record ID	[Greyed out]
Project Coordinator	Eric Soukup
Primary Contact	Eric Soukup

Action By: Contractor / PM / PC / Planner

Example

4. In 01 – General and 02 - Details, enter information.
5. Enter data for red asterisk fields.
6. Fill in other fields as applicable.

01 - General

Contract Reference Brief Description *

02 - Details

Spec Title

Specification Section

Page

Article/Paragraph

7. In 03 – Proposed Solution
8. Enter all data as applicable.

03 - Proposed Solution

Proposed Substitution Installer

Manufacturer Installer Phone

Model

Trade Name

Manufacturer Phone

9. In 04 –Difference
10. Enter data for red asterisked fields.

04 - Difference

Describe Variables in Equipment *

11. In 05 –Reason
12. Enter data for red asterisked fields.

05 - Reason

Reason for not providing specified item *

Action By: Contractor / PM / PC / Planner

Example

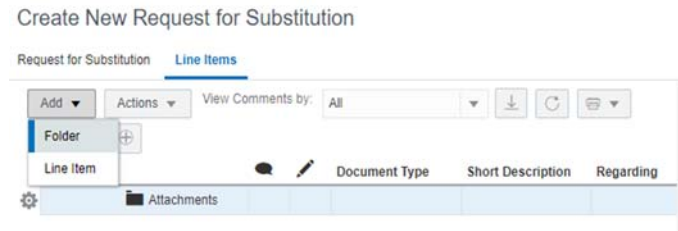
13. In 06 - Savings

14. Enter data as applicable.



15. Line Items are used to add attachments relevant to the request.

16. Select “Add” to add a Folder (see step 23) or a Line Item



17. A new window opens in the right-hand pane

18. To enter a Line Item, add associated document by clicking the paper clip icon

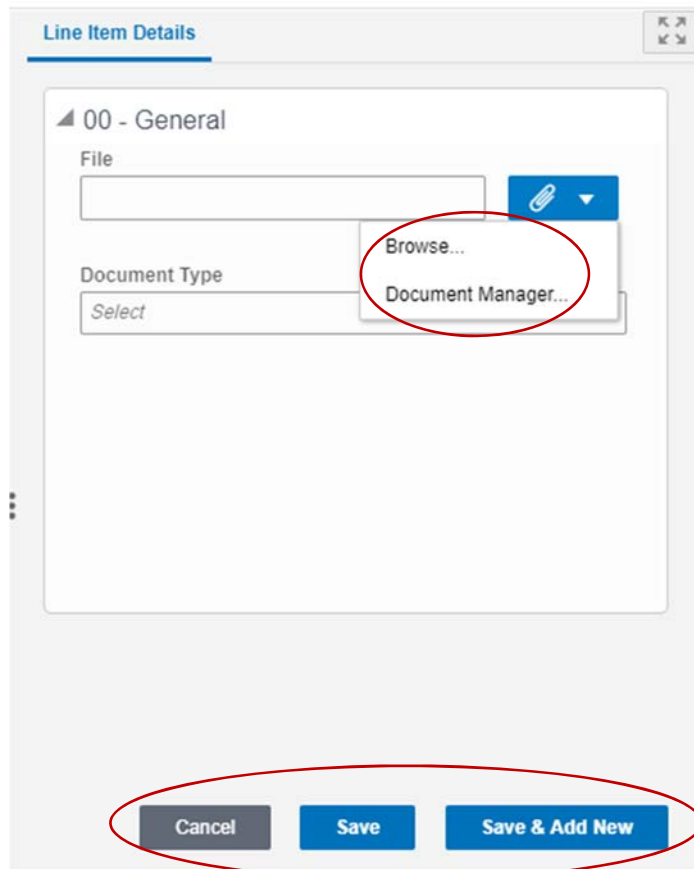
19. Selecting “Browse” allows attachment of files from your computer.

Note: Files uploaded from your computer will automatically be archived in Document Manager. Documents uploaded here should already follow standard naming conventions, see Section 5.

20. Selecting “Document Manager” opens the document management window. Drill down until you come to the file you wish to attach.

21. Select “Save” or “Save & Add New”

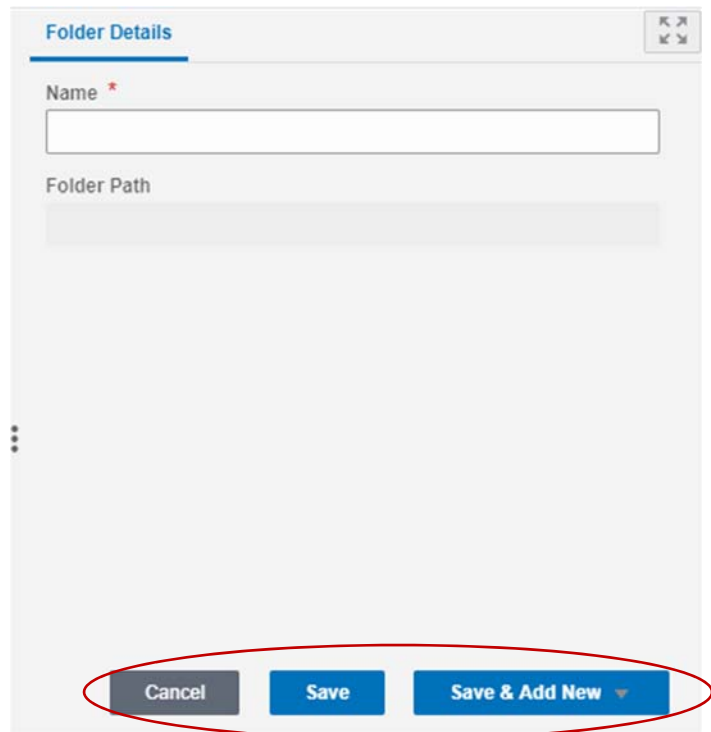
22. Selecting “Cancel” cancels the current entry.



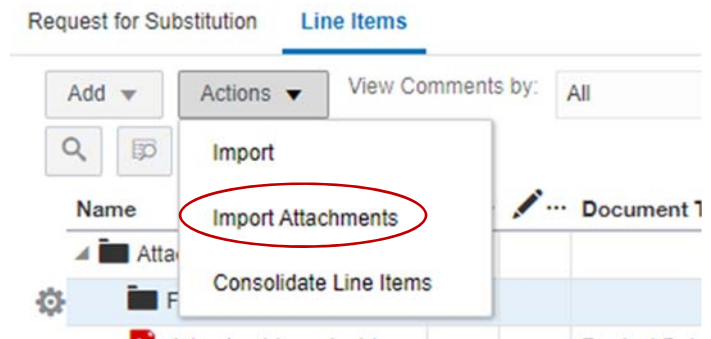
Action By: Contractor / PM / PC / Planner

Example

- 23. Optionally, Folder(s) may be added to contain multiple files for a specific folder.
- 24. **Enter** data as applicable
- 25. **Select** “Save” or “Save & Add New”
 - a. Selecting “Cancel” cancels the current entry.



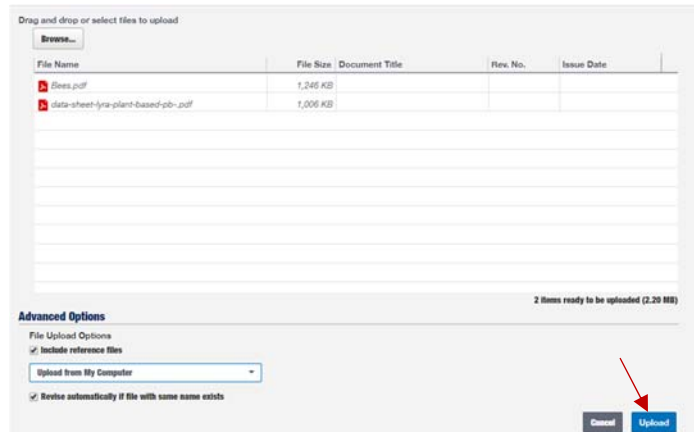
- 26. To add files, highlight Folder
- 27. **Select** “Import Attachments”



Action By: Contractor / PM / PC / Planner

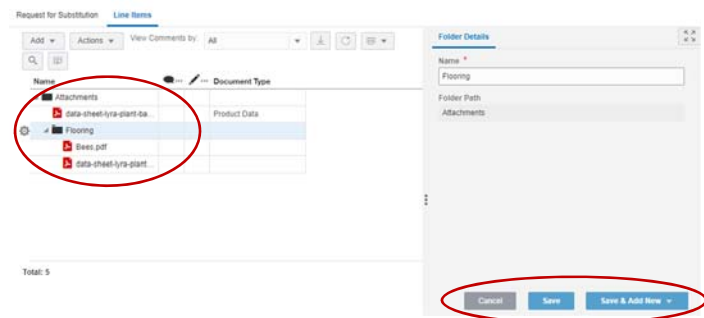
Example

- 28. **Select** “Browse” locate the file(s) to add, or file(s) may be dragged into the window to add.
- 29. **Select** “Upload”

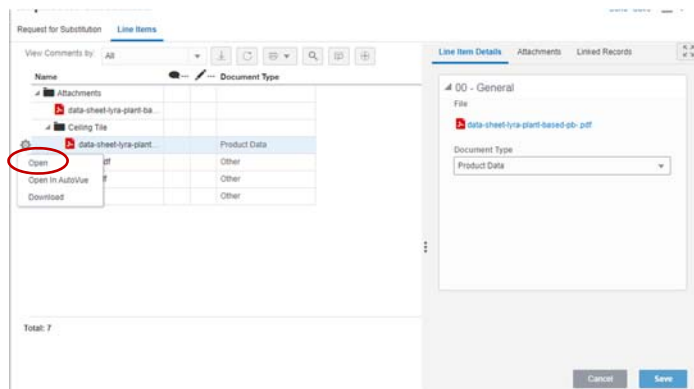


- 30. **Select** “Save” or “Save & Add New”
 - a. Selecting “Cancel” cancels the current entry.

Note: Files added as a Line Item are located under “Attachments”. Files added via the add Folder option are located under the specific Folder (in this example “Flooring”)

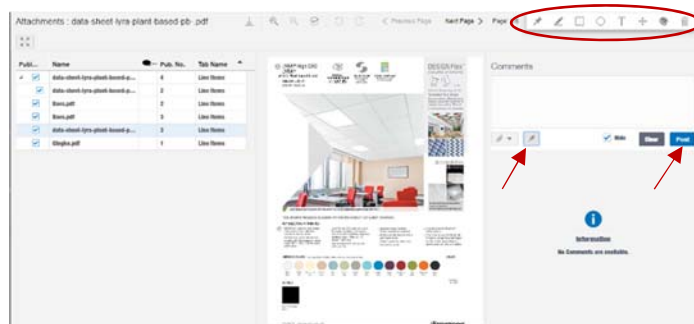


- 31. Attachments may be annotated comments entered by clicking the gear icon, then “Open”. Optionally, the file may be opened by clicking on the file name.



- 32. New window opens enabling markup and comment.
- 33. Write a comment or select the Push Pin icon in the Comments box. This opens a task bar with annotation type options.

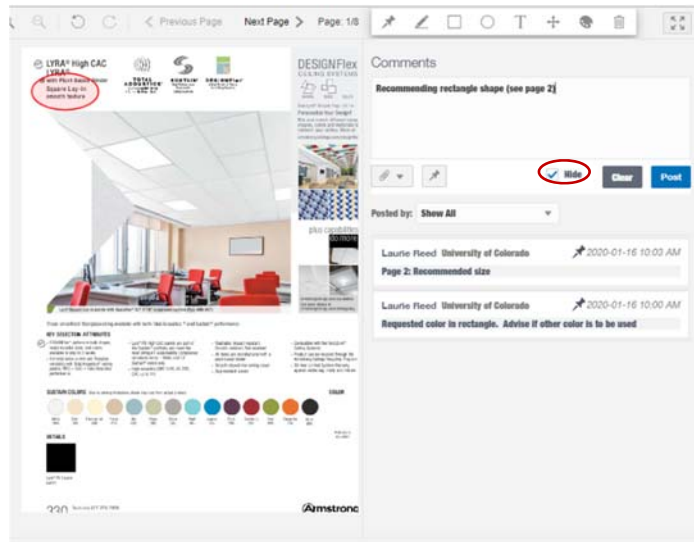
Note: A list of all attachments are on the left. Documents may be opened from this list.



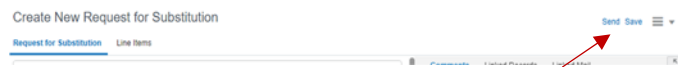
Action By: Contractor / PM / PC / Planner

Example

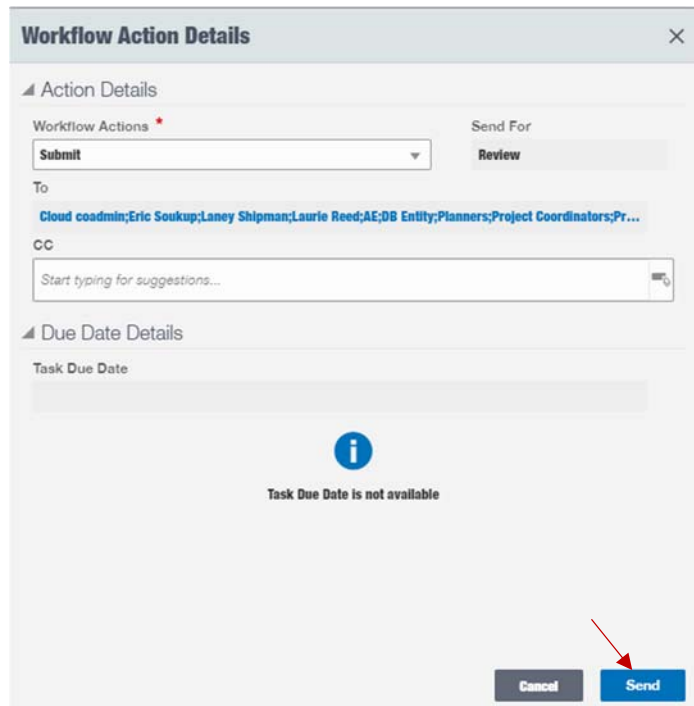
- 34. Record annotation(s) and comment(s). User should uncheck the Hide box so their comments can be viewed by others
- 35. Select Post
- 36. Markups made will disappear but be recorded in the posted markups below the Comments box. Repeat this step as needed.



- 37. **Select** “Send” to open the Workflow Action Details screen.
- 38. Optionally **select** “Save” to save as a Draft to complete later.



- 39. In the Workflow Action Details screen, note “Submit” is the only option.
- 40. Select “Send”.



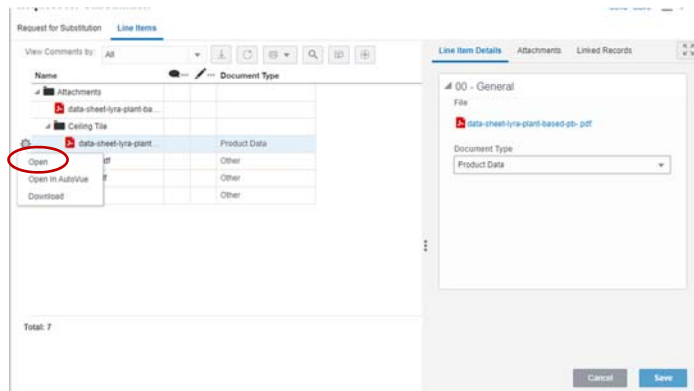
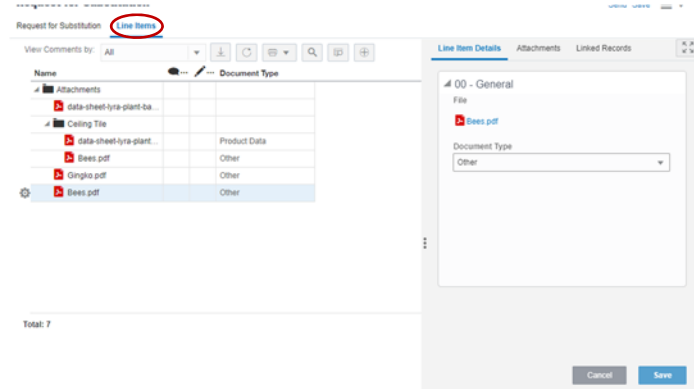
Action By: Contractor / PM / PC / Planner

Example

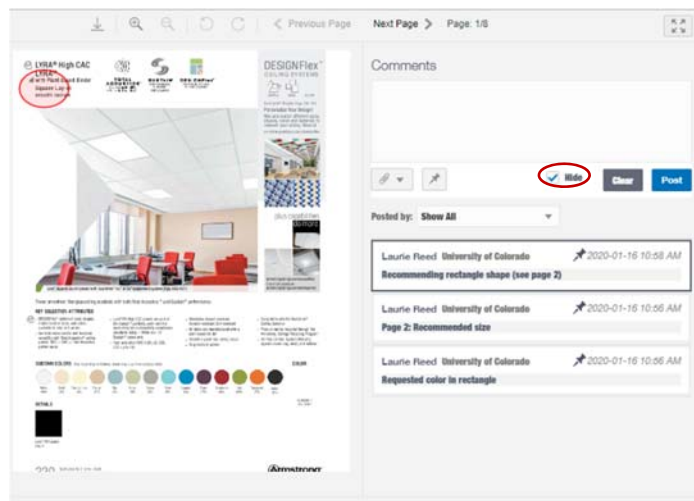
41. Reviewer receives notification of a new Request for Substitution and will **locate** the Request for Substitution in their Tasks.
42. **Open** Request for Substitution and **select** “Accept”.
43. All data is reviewed.
44. File(s) associated with the request are in “Line Items”



45. The Reviewer can review all comments and annotations by clicking the gear icon, then “Open”.
 Optionally, the file may be opened by clicking on the file name.



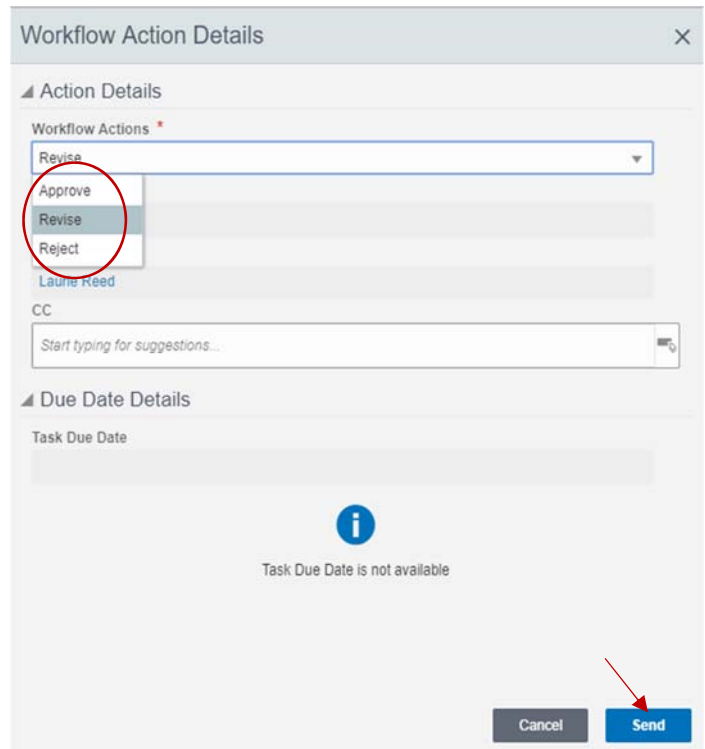
46. New window opens enabling reviewing of Requestor’s markup and comment.
47. All information is reviewed.
48. Selecting a comment box on the right shows the annotated page
49. Reviewer may make comments and annotations as needed, per previous steps.



Action By: Contractor / PM / PC / Planner

Example

50. **Select** “Send” to open the Workflow Action Details screen.
51. Optionally **select** “Save” to save as a Draft to complete later.
52. Clicking send opens Workflow Action Details screen
53. **Select** “Approve” to complete the Business Process.
 - a. Optionally, select “Revise” to send the Request for Substitution back to the Creator. Creator will accept the task, Revise and Resubmit back to Review.
 - b. Optionally, select “Reject” to terminate the Business Process.
54. **Select** “Send”.



END TASK

3.6 RISK MANAGEMENT

3.6.0 INTRODUCTION

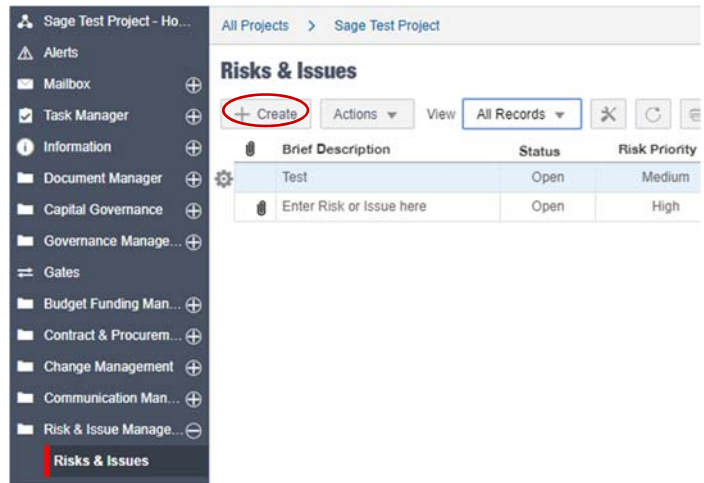
Risk and issue management is ongoing throughout the project. Any risk or issue should be captured as soon as it is identified. Additional information and mitigations should be added as the risk or issue is monitored.

3.6.1 MANAGING RISKS & ISSUES (UPDATED 11/12/2019)

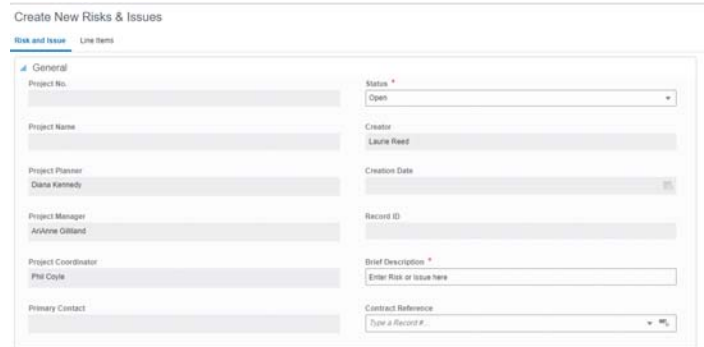
- Goals** How to submit a Request for Information (RFI) and manage the response.
- Navigation** Project>Risk Management>Risks & Issues
- Action By** Project Team
- Pre-requisites** None
- Related Files** None

Action By: Project Team Example

1. **Navigate** to Project>Risk Management>Risks & Issues.
 2. **Select** “Create”.
- Note: Risks & Issues does not have workflow.



3. In General section:
4. **Enter** data for red asterisk fields.
5. Note greyed fields will auto-populate.
6. **Select** “Contract Reference” if associated to a contract.



Action By: Project Team

Example

7. If the Contract Reference select is chosen, **find** available contracts for the project.
8. **Double-select** on the contract you are referencing to select it.

Create New Risks & Issues - Project No. P-0005 - Google Chrome
https://colorado-stage-unifier.oracleindustry.com/bp/mod/bp/record/new/uri/1171?_uref=uuu245719047t2

Contracts

🔍 📄 ⌵

Record Nu...	Title	Vendor Name	Contract Amount	Pending Changes	Approv
▲ Super Vendor					
▲ P-0005					
CO...	Test Contract	Super Vendor	105,000.00	0.00	
▲ Sage Method					
▲ P-0005					
CO...	Example Contract	Sage Method	185,000.00	0.00	

9. In 01 – Description, **enter** information about the risk.

▲ 01 - Description

Description *

Additional hazardous materials found

10. In 02 – Estimated Costs, **enter** estimates as known.

Note: “Probable Case Amount” is a sum of line items.

▲ 02 - Estimated Costs

Best Case Amount

7,000.00

Worst Case Amount

12,000.00

Probable Case Amount

0.00

Action By: Project Team

Example

11. In 03 – Risk Details / 04 – Resolution, **enter** additional risk information.

Note: If risk information changes as the project progresses, return to this screen and add or edit information as needed.

12. Under 04 – Resolution, **add** the actions to be completed, the mitigation, if the risk is realized.

13. Select “Line Items” from the top.

14. Select “Add”.

Create New Risks & Issues

Risk and Issue **Line Items**

Add Actions

No.	Cost Code	Code Name	Short Description	Amount
002	A10-20-03 30 20	Special Foundations	More costs	1,500.00
001	A10-00-99 99 99	Foundations	Brief description of costs	6,000.00

15. In the new line item, **select** Cost Code from drop down or select from the list.

16. **Enter** “Short Description”.

17. **Enter** “Amount” as the probable amount.

18. **Select** “Save”.

19. Optionally, **select** “Save & Add New” to add new line items.

20. Attachments or Linked Records can be added as needed.

21. **Select** “Submit” to publish the Risk or Issue.

END TASK

3.7 SCOPE MANAGEMENT

3.7.0 INTRODUCTION

Scope management is essential to managing design and execution of design.

Scope starts out at a high level when the project is first created and is expanded, improved and approved as the project progresses through the phases. Scope should be updated as changes are known.

Design reviews can follow three of the following scenarios, depending on the project:

- In-House Design WF: UCB Staff creates and provides the drawings and specs (designed in AutoCAD).
- No Design Firm WF: Project Scope Development Form and sketch are created by the project manager.
- Design Firm WF: Contract with an A/E Firm who provides the drawings and specs.

3.7.1 ENTERING SPECIFICATION SECTIONS (UPDATED: 03/04/2020)

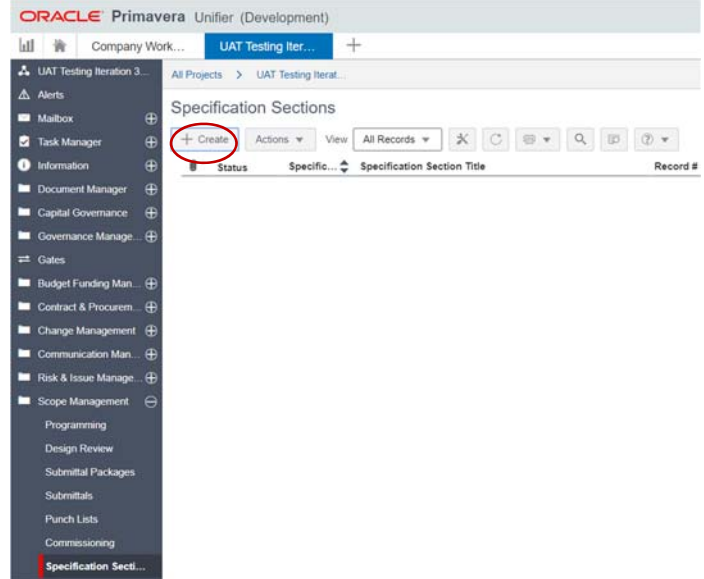
- Goals** How to enter the initial specification sections.
- Navigation** Project>Scope Management>Specification Sections
- Action By** Project Manager
- Pre-requisites** Defined spec sections for the project and/or an approved contract.
- Related Files** None.

Action By: Vendor

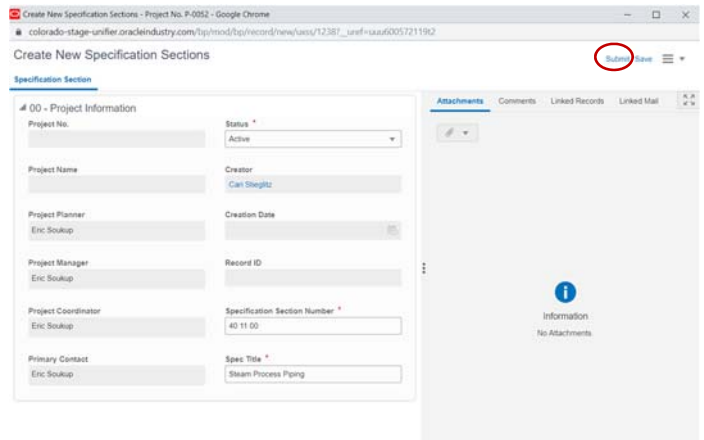
- In Unifier, **navigate** to Scope Management>Specification Sections and select “Create”.

Note: Specification Sections is used to capture the specification sections that are documented in multiple business processes.

Example



- In 00 – Project Information, **select** the following:
 - “Status” is set to Active
 - “Specification Section Number”: The number of the section e.g. CSI Masterformat in a format like 03-30-00.
 - “Spec Title”: The name of the section.
- Select** “Submit” to save and close.
- Repeat** until all spec sections are entered.
- Alternatively, use import to bring in all the Specification Sections.

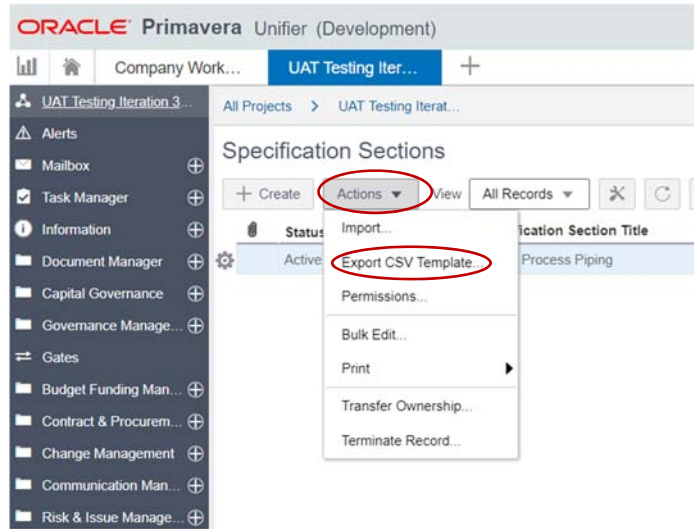


Action By: Vendor

Example

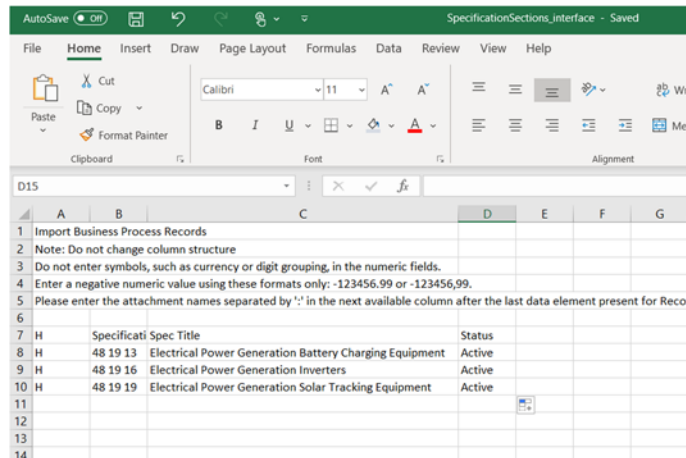
9. From the main screen, **select** “Actions” and “Export CSV Template”.
10. **Open** the Excel document and enter in all the Spec Sections.

Do not modify any of the Excel document structure, including adding or removing columns. Widening the column to show full text is okay.



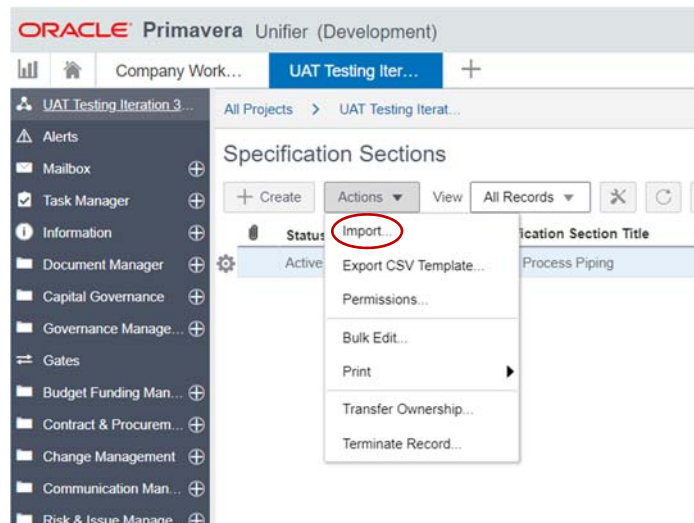
11. **Enter** each field for all rows needed.

Ensure to copy down the H into all rows that need to be imported. The “H” stands for header and is language that helps Unifier know where to put it.



12. **Save** and **close** file.

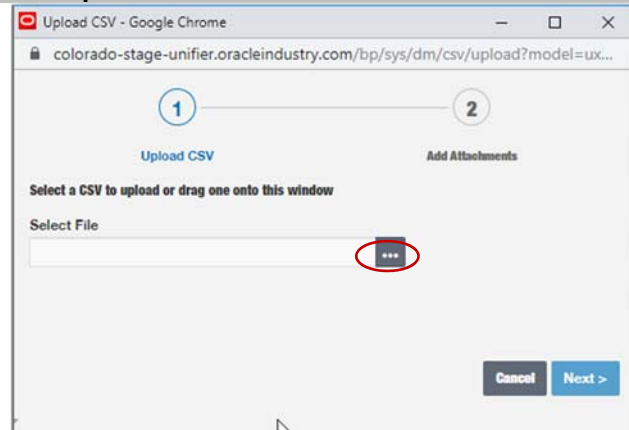
13. From the main screen, **select** “Import”.



Action By: Vendor

Example

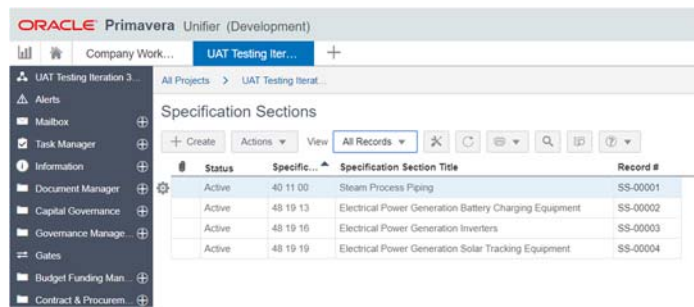
14. **Navigate** to the downloaded and modified CSV that was saved locally.
15. **Select** “Next” and follow prompt to complete upload.



16. When successfully loaded, Unifier will notify you. If there is no notification, refreshing the screen may help.

Note: If there are errors, download the error file to read what the issues are.

17. Repeat either process above until all the Specification Section items are entered.



END TASK

3.7.2 COMPLETING A NON-CAPITAL FEASIBILITY STUDY (UPDATED 03/12/2020)

- Goals** How to enter and route a non-capital feasibility study, if needed.
- Navigation** Project >Scope Management>Feasibility Studies
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Speed type and funding to start the feasibility study.
- Related Files** None.

Action By: PM / PC / Planner Example

- Navigate** to Project >Scope Management>Feasibility Studies and note there are differences between capital and non-capital.

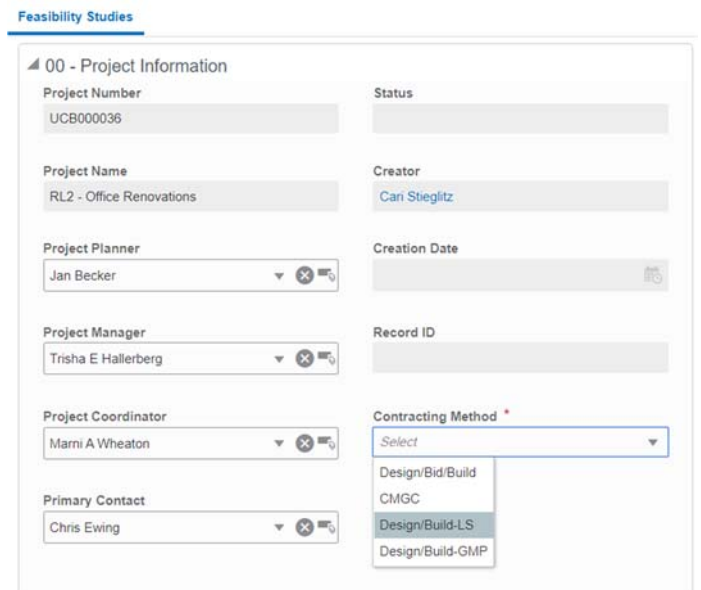
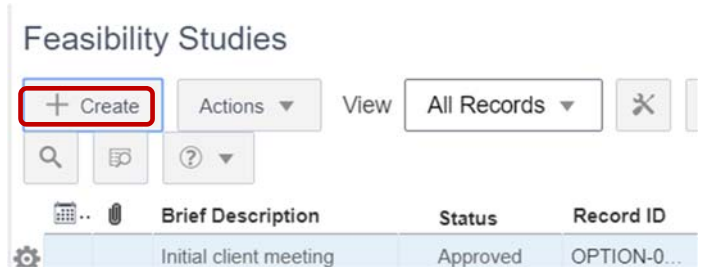
Note: For the occasional non-capital project that requires Cap Gov approval, this process will auto-create Cap Gov Review Packages when sent for Promote for Cap Gov Approval.

- Select** “Create”.

Note: Every step other than a revision step will have a task duration of 3 days.

- For Block 00, **note** that names auto-populate from Project Information but are editable.

- Select** the Contracting Method.



Action By: PM / PC / Planner

Example

5. In 01 – Introductory Questions, **work** through the questions with your client.
6. **Note** the text is for a prompt and should be highlighted and removed.

01 - Introductory Questions

Brief Description *

Previous Work with FM

Role in Project

Contacts

Other Introductory Questions

7. In 02 – SOW: General, **enter** as much information as is known.
8. **Note** the text is for a prompt and should be highlighted and removed.

02 - SOW: General

Project Goals and Needs

Current Use

Intended Use

Is the Use Changing?

Occupancy Changing (From)?

Occupancy Changing (To)?

Special Requirements

Restrictions/Sensitive Work

Action By: PM / PC / Planner

Example

- 9. In 03 – SOW: Architectural, **enter** as much information as is known.
- 10. **Note** the text is for a prompt and should be highlighted and removed.

03 - SOW: Architectural

Modifications
Are you adding or removing walls, windows, or doors, or modifying the ceilings?

Accessibility Impacts
Are you aware of any ADA/Accessibility impacts during staging, construction, and post-construction? If yes, please describe

Impacted Areas
Identify impacted areas (room numbering, routes of conduit, core drilling, etc.).

- 11. In 04 – SOW: Mechanical/Fire Suppression, **enter** as much information as is known.
- 12. **Note** the text is for a prompt and should be highlighted and removed.

04 - SOW: Mechanical/Fire Suppression

Add/Remove Equipment
Are you adding or removing mechanical equipment? If yes, please describe

Heat-Producing Equipment
Are you adding any heat-producing equipment? If yes, please describe

Specific Mechanical Concerns
Are there any special/specific mechanical scope or concerns?

- 13. In 05 – SOW: Environmental Health & Safety, **enter** as much information as is known.
- 14. **Note** the text is for a prompt and should be highlighted and removed.

05 - SOW: Environmental Health & Safety

Demo
What will be demolished? Floors, walls, ceiling, etc

Impacts to Lab or Shop Space
Is the project going to impact laboratory or shop space (wet labs, dry labs, machine shops, wood shops, fabrication/maker spaces, vivarium, etc.)?

Impacts to Exhaust
Are you installing or retrofitting any local or specialty exhaust system (local exhaust, snorkel, back-draft hoods, downdraft tables, fume hoods, perchloric acid systems, etc.)?

Action By: PM / PC / Planner

Example

- 15. In 06 – SOW: Electrical, **enter** as much information as is known.
- 16. **Note** the text is for a prompt and should be highlighted and removed.

06 - SOW: Electrical

Impacts to Lighting
Are you impacting the lighting?

Impacts to Electrical Load
Are you adding any electrical load?

Special Concerns
Are there any special/specific electrical scope or concerns?

- 17. In 07 – SOW: Plumbing, **enter** as much information as is known.
- 18. **Note** the text is for a prompt and should be highlighted and removed.

07 - SOW: Plumbing

Impacts to Nearby Lines
Are you impacting nearby water, steam, air, sanitary or storm lines?

Impacts to Floor Drains/Sinks
Are you impacting a floor drain or sink?

Special Concerns
Are there any special/specific plumbing scope or concerns?

- 19. In 08 – SOW: Civil, **enter** as much information as is known.
- 20. **Note** the text is for a prompt and should be highlighted and removed.

08 - SOW: Civil

Impacts to Pavement
Are you adding or removing pavement (concrete, asphalt, pavers, etc.)?

Impacts to Existing Grade
Are you changing the existing grade?

Action By: PM / PC / Planner

Example

21. In 09 – SOW: Landscaping/Irrigation, **enter** as much information as is known.

22. **Note** the text is for a prompt and should be highlighted and removed.

09 - SOW: Landscaping/Irrigation

Outside Staging

Are you staging outside?

Impacts to Landscaping/Irrigation

Will there be impacts to landscaping/irrigation?

23. In 10 – SOW: OIT, **enter** as much information as is known.

24. **Note** the text is for a prompt and should be highlighted and removed.

10 - SOW: OIT

Impacts to AV Equipment

Are you adding, removing, or impacting AV equipment?

Impacts to Data Jacks

Are you adding, removing, or relocating data jacks?

Impacts to Wireless Networks or OIT Equipment

Are you adding, removing, impacting wireless network hardware (or work that impacts OIT equipment spaces)?

Special Concerns

Are there any special OIT scope or concerns?

25. In 11 – SOW: Parking/Transportation, **enter** as much information as is known.

26. **Note** the text is for a prompt and should be highlighted and removed.

11 - SOW: Parking/Transportation

Parking or Dumpster Needs

Do you need parking or dumpster?

Impacts to Bike Racks

Are you going to move or block a bike rack?

Blocking of Sidewalks and Roads

Are you going to block a sidewalk or road?

Action By: PM / PC / Planner

Example

27. In 12 – Timeframe Questions, **enter** as much information as is known.

28. **Note** the text is for a prompt and should be highlighted and removed.

12 - Timeframe Questions

Timeframe

What is your timeframe? Do you have a hard deadline?

Area Availability

When is the project area available and for how long?

Other Scheduled Activities

Are there any other scheduled activities surrounding the project area that may impact or limit access and timing of the project?

Special Access Requirements

Are there special access requirements?

Occupied During Construction

Will the project area need to be occupied during the construction phase of the project?

Scheduling the Project Space

Who is responsible for scheduling the project space?

Other Timeframe Questions

Other questions/information pertinent to the timeframe

29. In 13 – Budget Questions, **enter** as much information as is known.

30. **Note** the text is for a prompt and should be highlighted and removed.

13 - Budget Questions

Financial Decision Maker

Who is the financial decision-maker for the project funding/budget?

Funding Constraints

Are there any time constraints associated with your funding source?

Purchasing on a Project

Explanation of purchasing on a project. (Explain the purchasing on the project budget must go through PM/PC but purchasing that does not come out of the project budget can be done by the client.)

Anticipated Budget

As a tool for assisting you with scope development and options to successfully complete your project, what is your anticipated budget?

Other Budget Questions

Other questions/information pertinent to the budget.

Action By: PM / PC / Planner

Example

- 31. In 14 – Stakeholder Questions, **enter** as much information as is known.
- 32. **Note** the text is for a prompt and should be highlighted and removed.

- 33. In 15 – Conclusion Questions, **enter** as much information as is known.
- 34. **Note** the text is for a prompt and should be highlighted and removed.

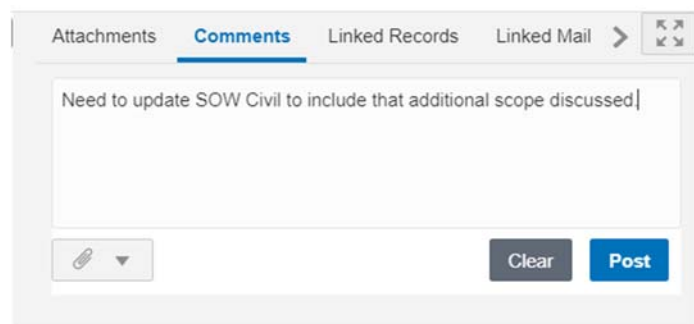
- 35. **Select** “Send” in the upper right corner of the form to open the Workflow Action Details form.
 - a. Optionally, **select** “Save” to continue working on later.
- 36. Select “Send for Review” to send the completed Feasibility Study to the reviewer.
 - a. Optionally, select “Hold for Review” if the Feasibility Study needs additional updates.
- 37. **Select** “Send”.

Note: You will notice a task duration of 3 business days.

Action By: Reviewer

Example

38. Recipient(s) receive Feasibility Study for review and selects “Accept” to start the review. Note that fields will be read only.
39. **Review** information.
40. In the upper right-hand corner of the form **select** “Comments”.
41. **Enter** comments in the “Comments” box.
42. **Select** “Post” to add comments.
43. The comment will appear below the **Comments** box.

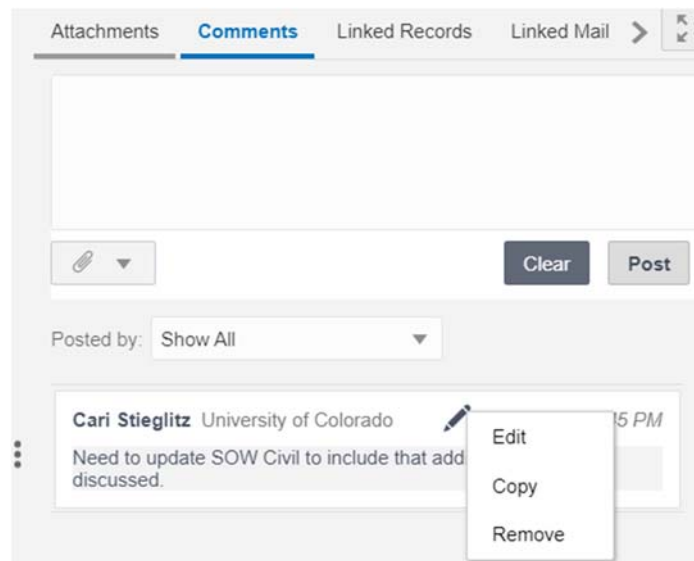


- a. The pencil icon shows that your comment is in draft mode and editable.
- b. To edit, copy, or remove a comment select the comment (a dark grey border will appear around the comment) and right click the pencil icon.
- c. A contextual menu will appear with the options listed above.

Note: When you add a new comment to a business process form, it remains as a draft until you send the form to the next step in the workflow.

Note: Attachments can be added from two options; Browse (from computer) or Document Manager.

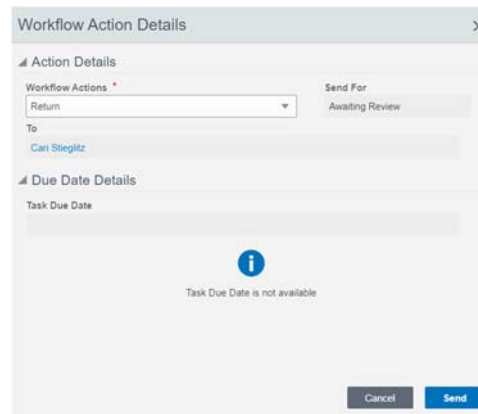
Note: The Comments box does not recognize formatting. Even if you use the Enter key to create a new line it will not show up in the final comment.



Action By: Reviewer

Example

44. **Select** “Send” to open the Workflow Action Detail screen.
45. **Note** “Return” is the only option and is pre-selected.
46. **Select** “Send” to return for review of the comments and updates.



Action By: PM / PC / Planner

Example

47. **Receive** comments from reviewer.
48. **Open** and **accept** the task to start updating.
49. **Select** “Comments” to review all comments made.
50. **Adjust** information in study to reflect comments.

51. **Select** “Send” to open the Workflow Action Details screen.
52. **Select** “Approved” if comments were straightforward and no additional review is needed.
 - a. Optionally, **select** “Review” to send back for another round of comment and review.
 - b. **Select** “Promote for Cap Gov Approval” if there is a need.
 - c. **Select** “Terminated” to cancel the entire process.
53. **Select** “Send”.



END TASK

3.7.3 COMPLETING A CAPITAL FEASIBILITY STUDY (UPDATED: 03/12/2020)

- Goals** How to enter and route a capital feasibility study.
- Navigation** Project >Scope Management>Feasibility Studies
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** Completed feasibility studies.
- Related Files** None.

Action By: PM / PC / Planner Example

- Navigate** to Project >Scope Management>Feasibility Studies and note there are differences between capital and non-capital.

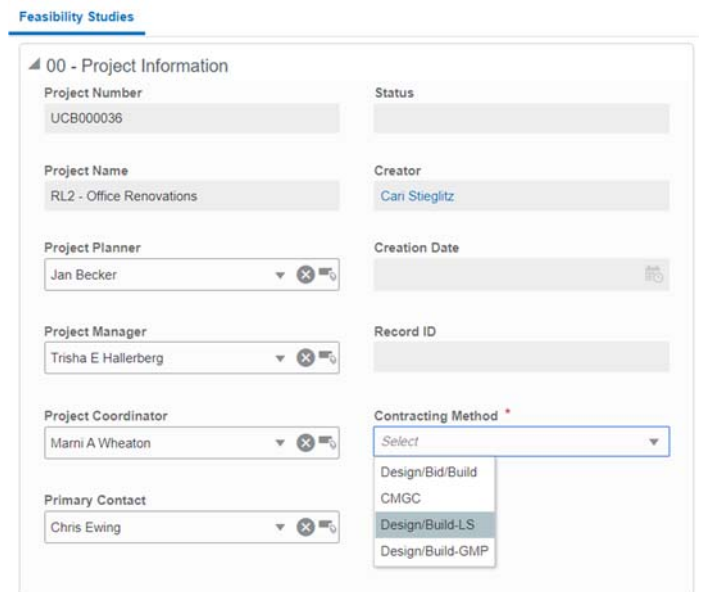
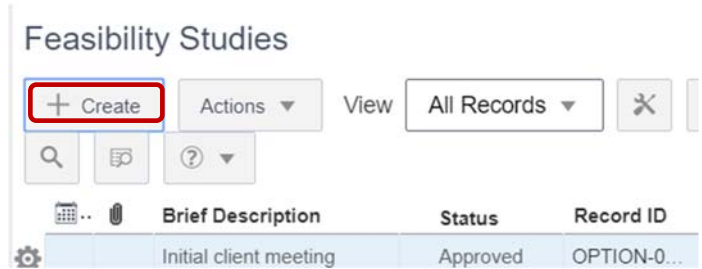
Note: This process will auto-create Cap Gov Review Packages when sent for Promote for Cap Gov Approval.

- Select** "Create".

Note: Every step other than a revision step will have a task duration of 3 days.

- For Block 00, **note** that names auto-populate from Project Information but are editable.

- Select** the Contracting Method.



Action By: PM / PC / Planner

Example

5. In 01 – Department Information, note this auto-populates from Project Information.

- a. If blank, close this form and enter in Project Information first.

01 - Department Information

Division ID	Department ID
Division Name	Department Name

6. In 02 – SOW: General, **enter** as much information as is known.

Note: the text is for a prompt and should be highlighted and removed.

02 - Project Summary

Brief Description *

Refurbish building to accommodate labs.

Project Summary *

Demolish existing classroom style and design for two labs.

7. In 03 – Risks & Concerns, **enter** as much information as is known.

8. In 04 – Questions & Recommendations, **enter** as much information as is known.

03 - Risks & Concerns

Risks & Concerns *

Timeline needs to be during the break.

04 - Questions & Recommendations

Questions/Recommendations *

Per the attached.

9. In 05 – Option Information, **enter** a summary of the options.

05 - Option Information

Description

Action By: PM / PC / Planner

Example

10. In 06 – Planned Dates, select the estimated dates for each of the key areas.

11. In 07 – Planned Budget, **enter** the most likely budget information.

12. **Note** the High and Low are automatically calculated in Section 08 & 09.

13. **Add** relevant attachments to support the feasibility option.

Action By: PM / PC / Planner

Example

14. **Select** “Send” in the upper right corner of the form to open the Workflow Action Details form.
 - a. Optionally, **select** “Save” to continue working on later.
15. **Note** “Submit” is the only option and is pre-selected.
16. **Add** the Recipient(s) in the “To” field.
17. **Select** “Send”.

Note: You will notice a task duration of 5 business days starting the next day.

Workflow Action Details

▲ Action Details

Workflow Actions *
Submit

Send For
Review

To
Cari Stieglitz X

▲ Due Date Details

Task Due Date
2020-03-20 12:15 AM

Cancel Send

Action By: Reviewer

Example

18. Recipient(s) receive Feasibility Study for review and selects “Accept” to start the review. Note that fields will be read only.
19. **Review** information.
20. In the upper right-hand corner of the form **select** “Comments”.
21. **Enter** comments in the “Comments” box.
22. **Select** “Post” to add comments.

Attachments **Comments** Linked Records Linked Mail >

Need to update SOW Civil to include that additional scope discussed|

Clear Post

Action By: Reviewer

Example

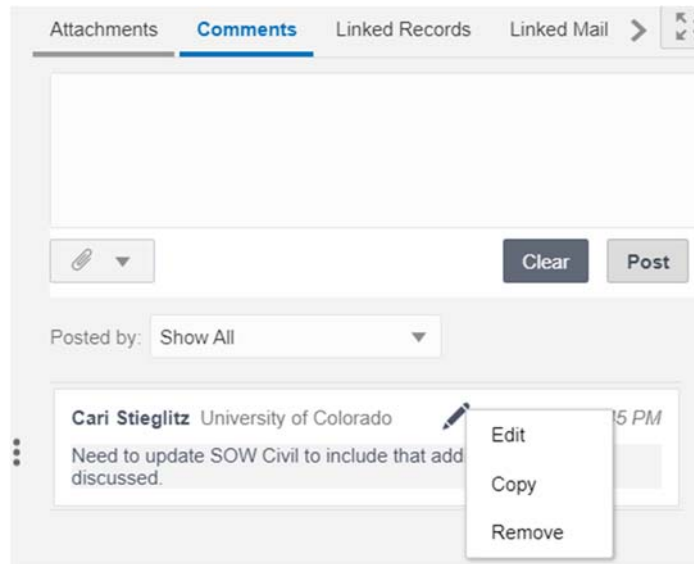
23. The comment will appear below the **Comments** box.

- a. The pencil icon shows that your comment is in draft mode and editable.
- b. To edit, copy, or remove a comment select the comment (a dark grey border will appear around the comment) and right select.
- c. A contextual menu will appear with the options listed above.

Note: When you add a new comment to a business process form, it remains as a draft until you send the form to the next step in the workflow.

Note: Attachments can be added from two options; Browse (from computer) or Document Manager.

Note: The Comments box does not recognize formatting. Even if you use the Enter key to create a new line it will not show up in the final comment.

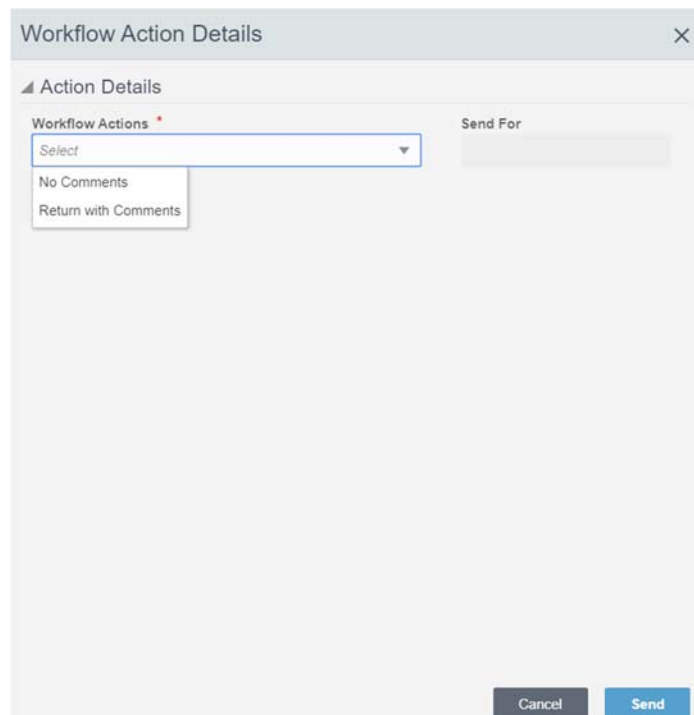


24. **Select** “Send” to open the Workflow Action Detail screen.

25. **Select** “Return with Comments” to send back.

- a. Optionally, **select** “No Comments” if no comments were entered.

26. **Select** “Send” to return for review of the comments and updates.

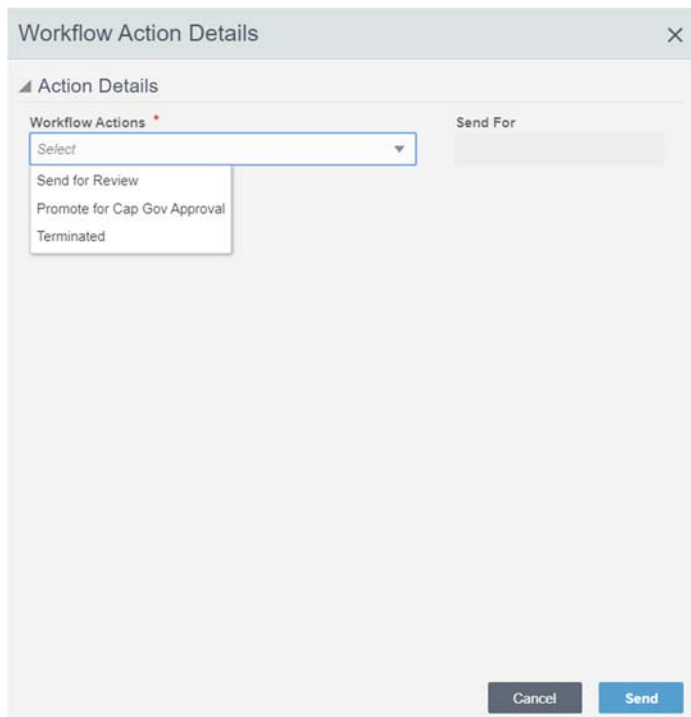
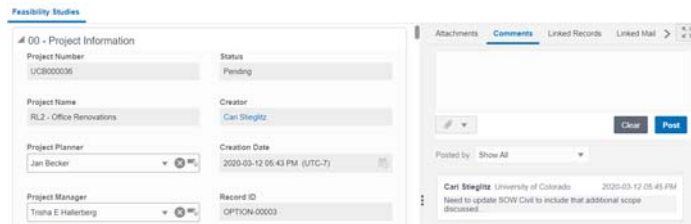


Action By: PM / PC / Planner

Example

27. **Receive** comments from reviewer.
28. **Open** and **accept** the task to start updating.
29. **Select** “Comments” to review all comments made.
30. **Adjust** information in study to reflect comments.
31. **Select** “Send” to open the Workflow Action Details screen.
32. **Select** “Promote for Cap Gov Approval” if comments were straightforward and no additional review is needed.
 - a. Optionally, **select** “Send for Review” to send back for another round of comment and review.
 - b. **Select** “Terminated” to cancel the entire process.
33. **Select** “Send”.

Note: This will automatically generate a Status Report and move the attachments and basic information. Next step will be to update any remaining information and send on.



END TASK

3.7.4 COMPLETING PROGRAMMING (UPDATED: 10/24/2019)

Goals How to complete programming.

Navigation Project>Scope Management>Programming

Action By Project Manager (PM) / Project Coordinator (PC) / Planner

Pre-requisites Needs an approved/promote for cap gov approval Feasibility Studies record.

Related Files None.

Action By: PM / PC / Planner

Example

1. **Navigate** to Project>Scope Management> Programming.
2. **Select** “Create”.
3. Under 00 – Project Information, **select** the approved Feasibility Study record to copy from.
 - a. Note: Greyed fields will auto-populate as appropriate.

The screenshot shows the Oracle Primavera Unifier interface. The top navigation bar includes 'ORACLE Primavera Unifier (Development)' and 'Company Work... UAT Testing Iter...'. The left sidebar contains a navigation menu with 'Programming' highlighted. The main content area shows the 'Programming' screen with a '+ Create' button circled in red. Below this is the '00 - Project Information' form with the following fields:

Project No.	Status
Project Name	Creator Laurie Reed
Project Planner AriAnne Gilliland	Creation Date
Project Manager AriAnne Gilliland	Record ID
Project Coordinator AriAnne Gilliland	Copy from Feasibility OPTION-00004
Primary Contact AriAnne Gilliland	

The 'Copy from Feasibility' field is circled in red, showing the value 'OPTION-00004'.

Action By: PM / PC / Planner

Example

4. In 01 – Division, **check** as many boxes that apply.

01 - Division

Academic

Administration

Auxiliary

5. In 02 – Project Summary, **enter** data for red asterisked fields.

Note: Project Summary will auto-populate from a Capital Feasibility Studies record.

02 - Project Summary

Brief Description *

Enter brief description

Project Summary *

Enter project summary

6. In 03 – Risks & Concerns, **enter** risks or concerns.

Note: Risks & Concerns will auto-populate from a Capital Feasibility Studies record.

03 - Risks & Concerns

Risks & Concerns *

Enter risks & concerns

7. In 04 – Questions & Recommendations, **enter** any questions or recommendations.

Note: Questions/Recommendations will auto-populate from a Capital Feasibility Studies record.

04 - Questions & Recommendations

Questions/Recommendations *

Enter Questions and/or Recommendations

8. In 05 - Option Information, **enter or update** description as pertinent

9. **Attach** the programming option and then select "Yes".

05 - Option Information

Description

Programming Option Attached? *

Yes

Yes

Action By: PM / PC / Planner

Example

10. In 06 – Planned Dates, **select** or **update** the estimated dates.

Note: These fields are all Date Pickers. When the small icon to the right is selected a calendar will drop-down as shown in the screenshot below. Optionally, type the date in the exact format shown.

Note: Ensure that every subsequent date in the block succeeds the date prior. For example, Programming Start date must be earlier than Design Start date. If Programming Start comes after Design Start an error will occur when attempting to send the record along the workflow

06 - Planned Dates

Programming Start *

Design Start *

BOR Approval *

Construction Start *

Occupancy *

Programming Start *

11. In 07 – Planned Budget (Most Likely), **update** the required fields.

- a. Note greyed fields are auto calculations.

07 - Planned Budget (Most Likely)

1. Professional Services (Likely) *

2. Construction Total (Likely)

2a. Infrastructure and Site (Likely) *

2b. Building Construction (Likely) *

3. Equipment and Furnishing (Likely) *

4. Miscellaneous (Likely) *

5. Project Contingency (Likely) *

Total Budget (Likely)

Action By: PM / PC / Planner

Example

12. For Blocks 08 – 09 – Planned Budget (High & Low), **note** all fields are calculation based on values inputted in Block 07.

08 - Planned Budget (High +50%)

1. Professional Services (High)	750,000.00
2. Construction Total (High)	607,500.00
2a. Infrastructure and Site (High)	82,500.00
2b. Building Construction (High)	525,000.00
3. Equipment and Furnishing (High)	63,000.00
4. Miscellaneous (High)	13,500.00
5. Project Contingency (High)	7,500.00
Total Budget (High)	1,441,500.00

13. Under 10 – Feasibility Planned Budget, **note** greyed fields are auto calculations.

10 - Feasibility Planned Budget

Total (Likely)	0.00
Total (High)	0.00
Total (Low)	0.00

14. **Select** “Send” to open the Workflow Action Details screen.

Create New Programming Send Save

Programming

00 - Project Information	Attachments	Comments	Linked Records	Linked Mail
Project No. <input type="text"/>	<input type="button" value="Send"/>			
Status <input type="text"/>				

15. **Note** that “Submit” is the only option and is pre-selected.

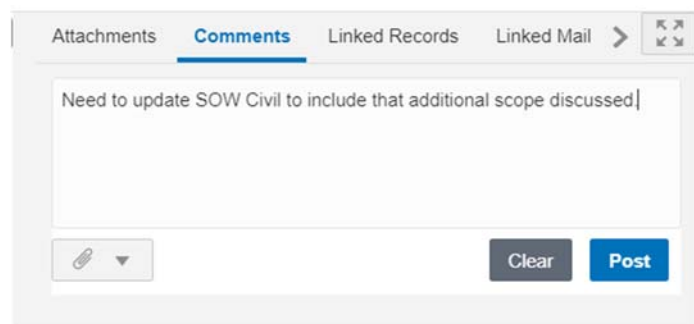
16. **Add** Recipient(s) in the “To” field.

17. **Select** “Send”.

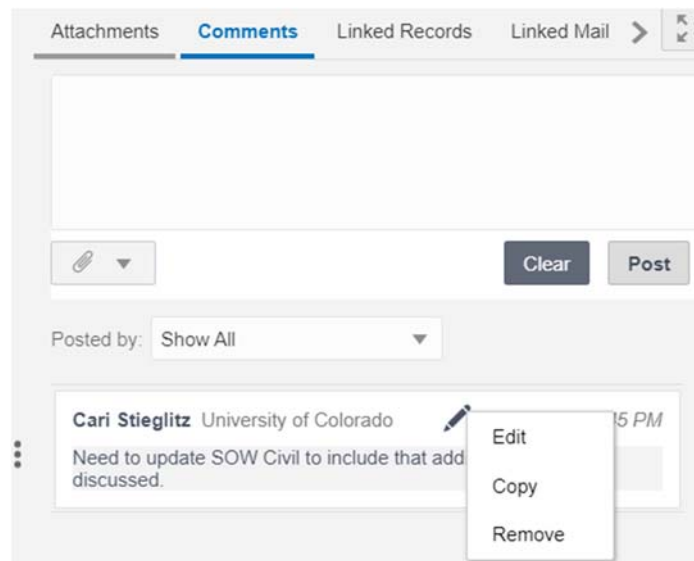
Action By: Reviewer

Example

18. Recipient(s) receive Programming Plan for review and selects “Accept” to start the review. Note that fields will be read only.
19. **Review** information.
20. In the upper right-hand corner of the form **select** “Comments”.
21. **Enter** comments in the “Comments” box.
22. **Select** “Post” to add comments.
23. The comment will appear below the **Comments** box.



- a. The pencil icon shows that your comment is in draft mode and editable.
- b. To edit, copy, or remove a comment select the comment (a dark grey border will appear around the comment) and right click the pencil icon.
- c. A contextual menu will appear with the options listed above.



Note: When you add a new comment to a business process form, it remains as a draft until you send the form to the next step in the workflow.

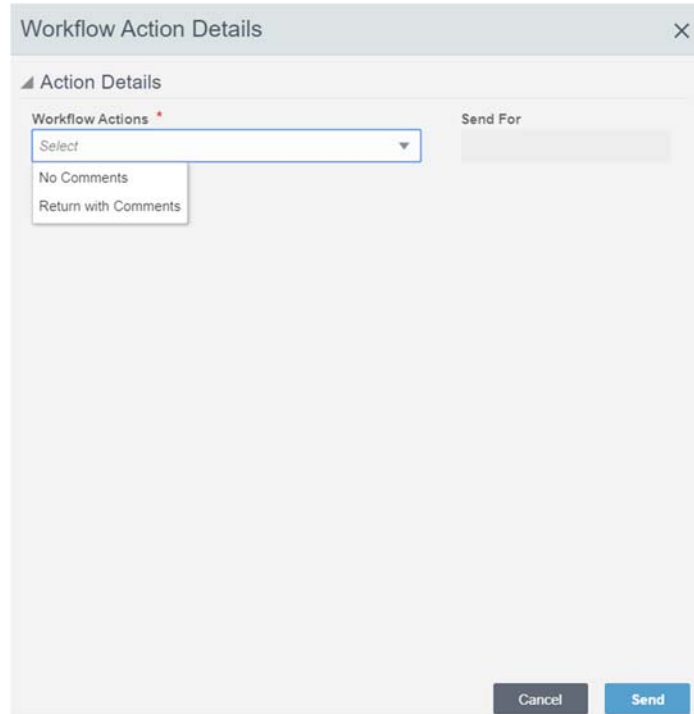
Note: Attachments can be added from two options; Browse (from computer) or Document Manager.

Note: The Comments box does not recognize formatting. Even if you use the Enter key to create a new line it will not show up in the final comment.

Action By: Reviewer

Example

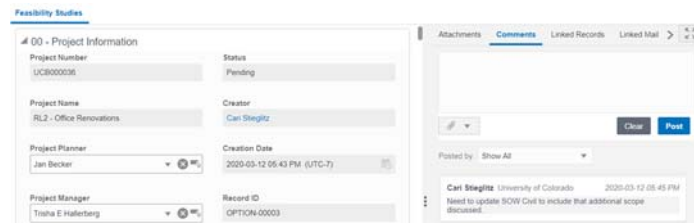
24. **Select** “Send” to open the Workflow Action Detail screen.
25. **Select** “Return with Comments” to send back.
 - a. Optionally, **select** “No Comments” if no comments were entered.
26. **Select** “Send” to return for review of the comments and updates.



Action By: PM / PC / Planner

Example

27. **Receive** comments from reviewer.
28. **Open** and **accept** the task to start updating.
29. **Select** “Comments” to review all comments made.
30. **Adjust** information in study to reflect comments.



Action By: PM / PC / Planner

Example

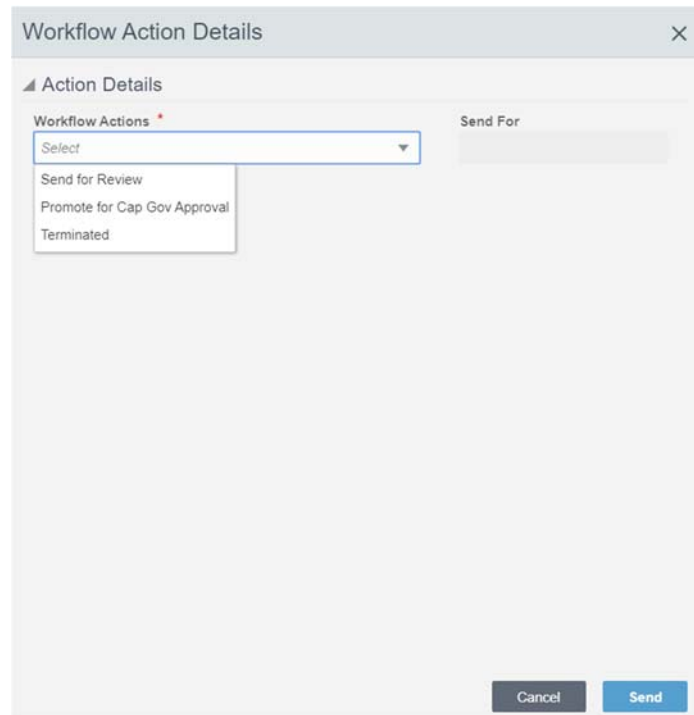
31. **Select** “Send” to open the Workflow Action Details screen.

32. **Select** “Promote for Cap Gov Approval” if comments were straightforward and no additional review is needed.

- a. Optionally, **select** “Send for Review” to send back for another round of comment and review.
- b. **Select** “Terminated” to cancel the entire process.

33. **Select** “Send”.

Note: This will automatically generate a Status Report and move the attachments and basic information. Next step will be to update any remaining information and send on.



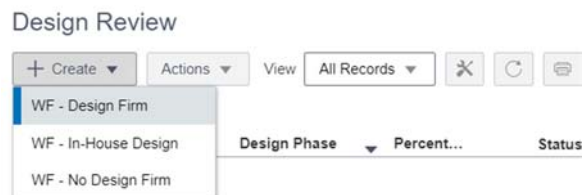
END TASK

3.7.5 COMPLETING A DESIGN FIRM OR IN-HOUSE DESIGN REVIEW (UPDATED: 03/12/2020)

- Goals** How to complete review for projects that have a design firm or an in-house design team.
- Navigation** Project>Scope Management>Design Review
- Action By** Project Manager (PM) / Project Coordinator (PC) / Planner
- Pre-requisites** None.
- Related Files** 3.7.6 Completing a No Design Firm Review

Action By: PM / PC / Planner Example

1. **Navigate** to Project>Scope Management>Design Review.
2. **Select** “Create”.
3. **Select** the Design Firm Workflow.
4. **Note** the In-House Design workflow has less reviewers, but the design still takes place in a review software outside of Unifier.



5. In the 01 – Design Firm block, **select** the Vendor from the list or start typing the name.
6. **Note** any fields related to the Vendor are auto populated but remain editable.

7. In 02– Project Summary **enter** a description.

Note: Updating information here does not write back to the Vendor master record.

Note: The project summary auto-populates from the project information form but is editable.

Action By: PM / PC / Planner

Example

8. In 03 – Design Phase, **select** the Design Phase as Construction Documents.

Note: Depending on the option you select for the Design Phase, the Bid Package No and Percentage change behavior.

All options except the below have Percentage Required, Bid Package No. as Read-Only and Bid Package Description as Read-Only.

If CMGC Bid Package is selected, then Percentage Bid Package No. and Bid Package Description become required.

If Scope Change is selected then Percentage becomes Read-Only, Bid Package No. Read-Only, Bid Package Description become Read-Only.

9. **Select** the Percentage of Design as 100%.
10. **Select** the Last Review as “Yes”.
11. **Select** the Date of the documents or package.
12. **Select** the Subconsultants tab.
13. **Select** “Add” to add a new line.

14. Under 00 – Subconsultants, **add** subcontractor information:

- a. Contact Name
- b. Contact Title
- c. Contact Email
- d. Contact Phone Number

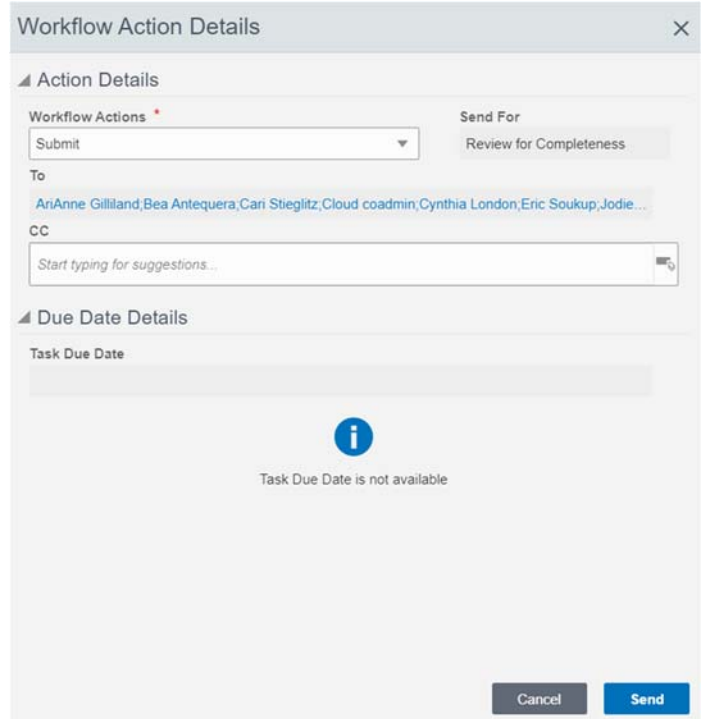
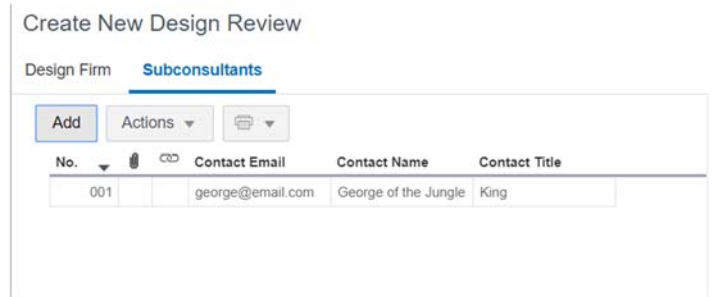
Note: This provides design review specific contact information for the reviewers. Though not required, this can be helpful.

Create New Design Review

Action By: PM / PC / Planner

Example

15. **Select** “Save” at the bottom of the screen.
 - a. The subcontractor will appear under the Subconsultants tab.
16. **Continue** entering all subcontractors related to this design review.
17. **Attach** the Design documents.
18. When all information is complete, **select** “Send” to open the Workflow Action Detail screen.
 - a. Optionally **select** “Save” to save your works to your drafts folder.
19. **Note** that “Submit” is the only option and it is pre-selected.
20. **Note** the names in the Design Reviewer
 - a. If names are not included that need to be part of review, save this and notify your Project Coordinator.
 - b. Optionally **add** in CC names by selecting additional recipients.
21. **Select** “Send”.



22. **Note** the notification that the record has been created successfully.



Action By: PM / PC / Planner

Example

23. **Find** the record that was just created in the log and open.

24. **Select** “Accept” to review the submission.

Note: You can only select “Decline” when multiple people are assigned to the task and you are not the last person to respond.

25. **Note** this step is for review and nothing is editable.

26. **Review** submission for Completeness.

27. **Select** “Send” to open the Workflow Action Details screen.

28. **Select** “Notify Reviewers”.

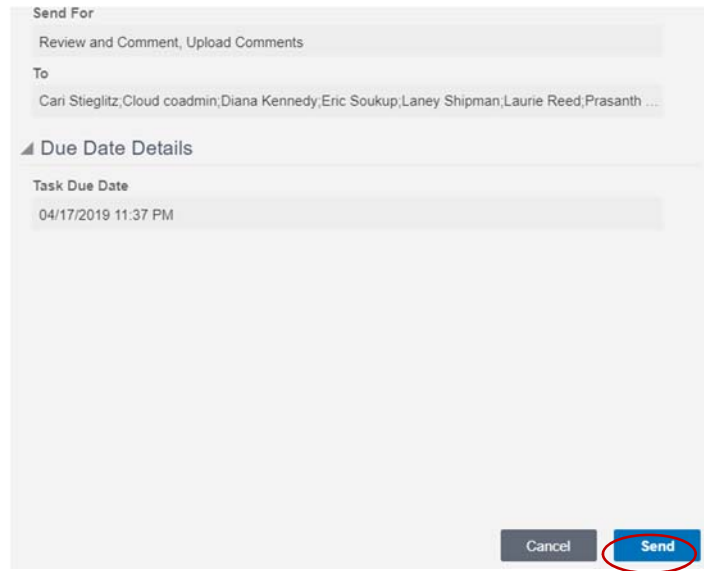
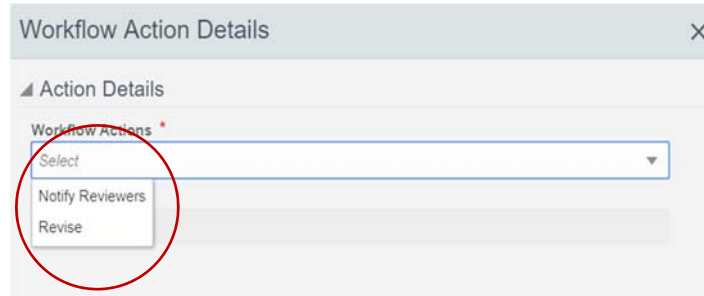
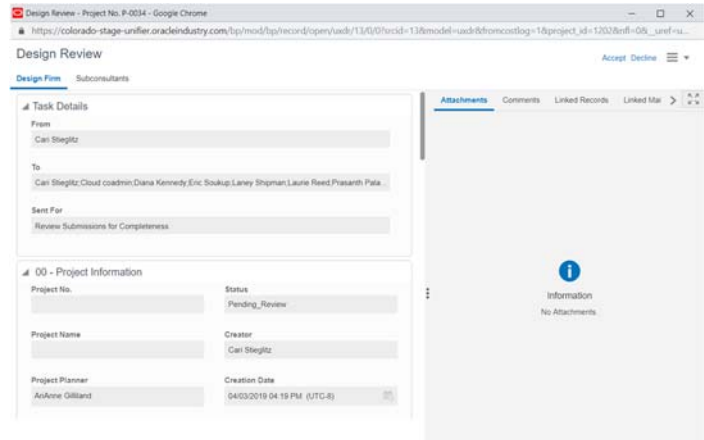
- a. Optionally, **select** “Revise” to send back to the creator for revisions. If you do, use General Comments to let them know what revisions you are looking for.

29. **Validate** the names in the “To”.

30. **Note** the task has a due date.

31. **Select** “Send” to send to the reviewers.

Note: Review is a CONSENSUS step in the workflow, which means every person needs to review and send on.



Action By: Design Reviewer

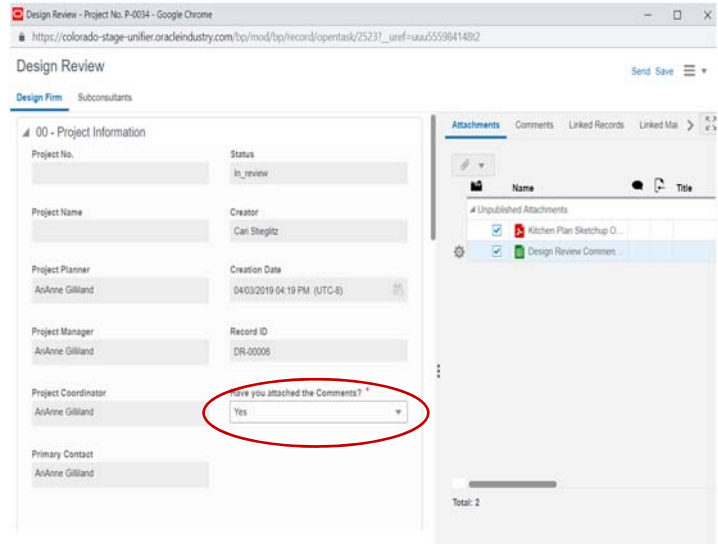
Example

32. **Open** the task received and **select** “Accept” to start.



33. **Complete** the design review and capture all comments in the attachment.

34. **Attach** the comments spreadsheet to the design review record.

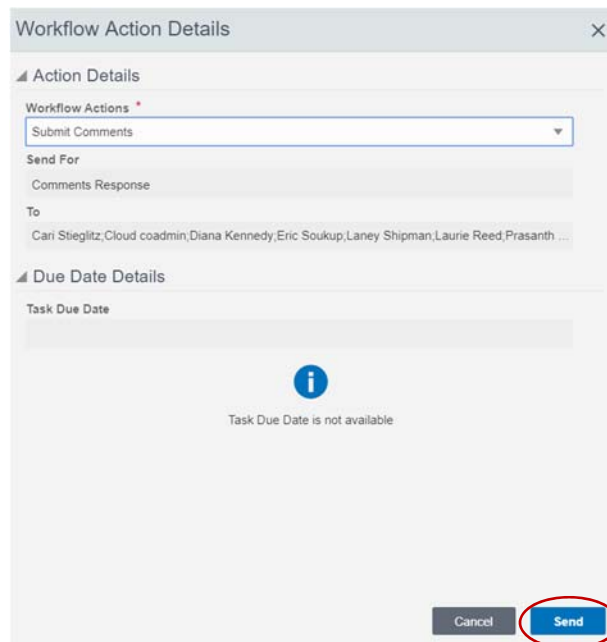


35. **Select** “Yes” for the field “Have you attached the Comments?” is in block 00-Project Information.

36. **Select** “Send” to open the Workflow Action Details screen.

37. **Select** “Submit Comments” to send on.

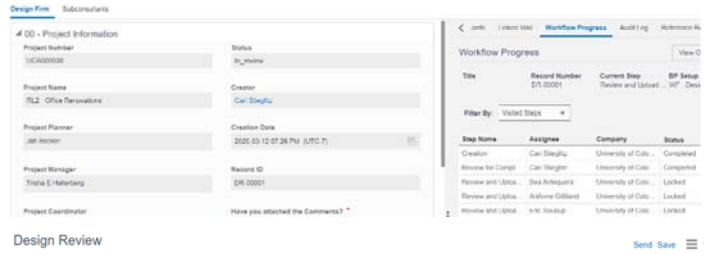
- a. Optionally, **select** “Revise” to send back to the creator for revisions. If you do, use General Comments to let them know what revisions you are looking for.



Action By: Architect or Project Team

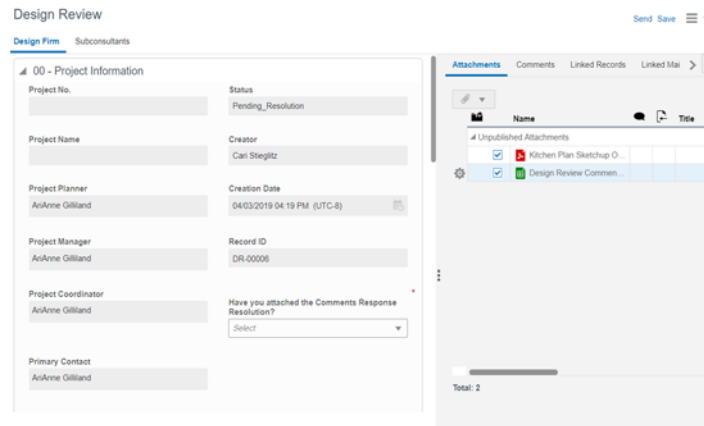
Example

- 38. **Wait** for all comments to be received.
- 39. **Log in** to view workflow progress after date has passed to contact those that have not completed the review.

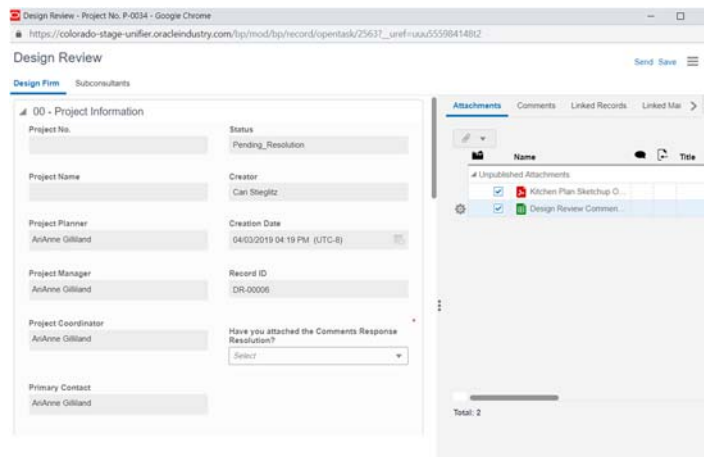


- 40. **Open** task and “Accept” to start task.
- 41. **Review** the comments on the attachment and compile them into one file.

Note: If comments are not attached, send the reviewer an email and attach them this way. Add a General Comment that the approach included receipt by email.



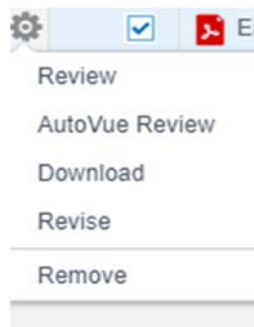
- 42. **Attach** the compiled comments spreadsheet (without answers).
- 43. **Select** “Yes” for the field “Have you attached the Comments Response Resolution?” in block 00-Project Information.
- 44. **Select** “Send” to open the Workflow Action Details screen.



- 45. To add a new revision of the same document, **click** the file once so it is highlighted.
- 46. **Select** the “tool” icon to the left and then “Revise”.

Note: Never select “ AutoView Review.”

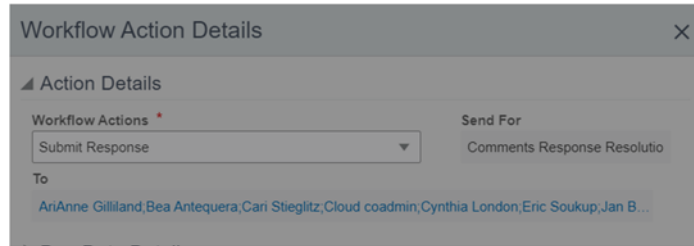
- 47. **Upload** the new version.



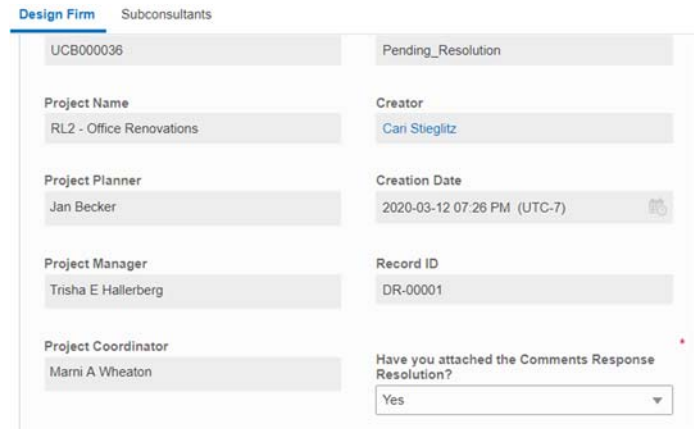
Action By: Architect or Project Team

Example

- 48. **Note** that “Submit Response” is the only option and is pre-selected.
- 49. **Select** “Send”.
- 50. **Start** responding to comments.



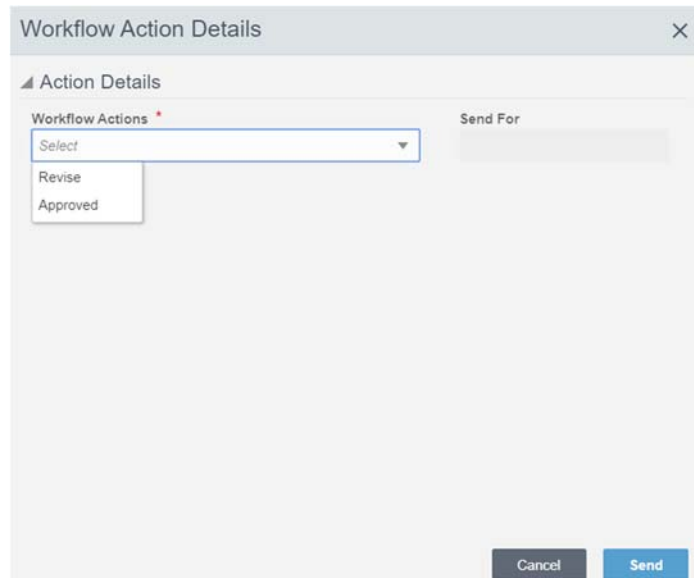
- 51. **Complete** the Comments response and return to Unifier.
- 52. **Open** the task and **select** “Accept” (if not already accepted) to issue design stage approval.
- 53. **Attach** the comments response and any updated design files.
- 54. **Select** “Send” to open the Workflow Action Detail screen.



- 55. **Select** “Approved” if comments were minor.
 - a. Optionally, **select** “Revise” if additional review is needed.

- 56. **Select** “Send”.

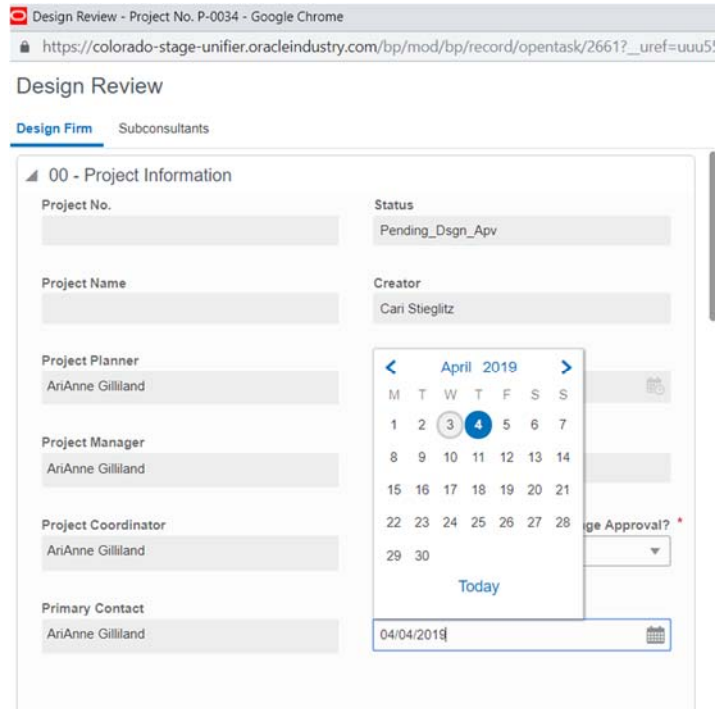
Note: If the selections for Construction Documents, 100% and Yes for final were not selected, the review would end here.



Action By: Architect or Project Team

Example

- 57. **Open** the task and **select** “Accept” (if not already accepted) to issue design stage approval.
- 58. **Complete** the design stage approval.
- 59. **Return** to Unifier and **upload** the copy.
- 60. **Change** “Have you attached the Design Stage Approval?” to “Yes”.
- 61. **Add** the date of the approval.
- 62. **Select** “Send” to open the Workflow Action Details screen.



- 63. **Select** “Issue Approval”.
- 64. **Select** “Send”.

Note: If the selections for Construction Documents, 100% and Yes for final were not selected, the review would end here.



Action By: Architect or Project Team

Example

- 65. **Prepare** and **submit** “For Construction” set.
- 66. **Open** the task and **select** “Accept”.
- 67. **Stamp** the final documents.
- 68. **Upload** stamped version back into the record.
- 69. **Change** “Have you attached the stamped ‘For Construction’ set?” to “Yes”.
- 70. **Select** the date of the “For Construction” set.

Note: This set should also be uploaded to Acela.

- 71. **Select** “Send” to open the Workflow Action Details screen.
- 72. **Select** “Submit” to send for validation of the final set.
- 73. **Select** “Send”.

A screenshot of a web form titled "00 - Project Information". The form is organized into two columns. The left column contains fields for Project No., Project Name, Project Planner (AriAnne Gilliland), Project Manager (AriAnne Gilliland), Project Coordinator (AriAnne Gilliland), and Primary Contact (AriAnne Gilliland). The right column contains fields for Status (Pending_For_Constr), Creator (Cari Stieglitz), Creation Date (04/03/2019 06:09 PM (UTC-8)), Record ID (DR-00008), a dropdown menu for "Have you attached the stamped 'For Construction' set?" (set to "Yes"), and a date field for "Date of 'For Construction' set?" (04/05/2019).

A screenshot of a "Workflow Action Details" dialog box. It has a title bar with a close button (X). The dialog is divided into two sections: "Action Details" and "Due Date Details". Under "Action Details", there is a "Workflow Actions" dropdown menu set to "Submit", a "Send For" field with the text "Review Set for Completeness", and a "To" field with a list of names: "Cari Stieglitz, Cloud coadmin, Diana Kennedy, Eric Soukup, Laney Shipman, Laurie Reed, Prasanth ...". Under "Due Date Details", there is a "Task Due Date" field which is empty. Below this field is a blue information icon (i) and the text "Task Due Date is not available". At the bottom right of the dialog are two buttons: "Cancel" and "Send".

Action By: Architect or Project Team

Example

74. **Open** the task and **select** “Accept” to review the final set for completeness.
- a. If drawings look good, select “Send” and “Approved” to finalize the record and close the design review.
 - b. Optionally, select “Revise” to send back for stamped drawings.
75. **Repeat** this process for each design review and each phase, as appropriate.

Workflow Action Details

▲ Action Details

Workflow Actions *

Approved

Send For

End

CC

Start typing for suggestions...

Cancel Send

END TASK

3.7.6 COMPLETING A NO DESIGN FIRM REVIEW (UPDATED: 03/12/2020)

Goals How to manage design including design comments, transmittals and comments.

Navigation Project>Scope Management>Design Review

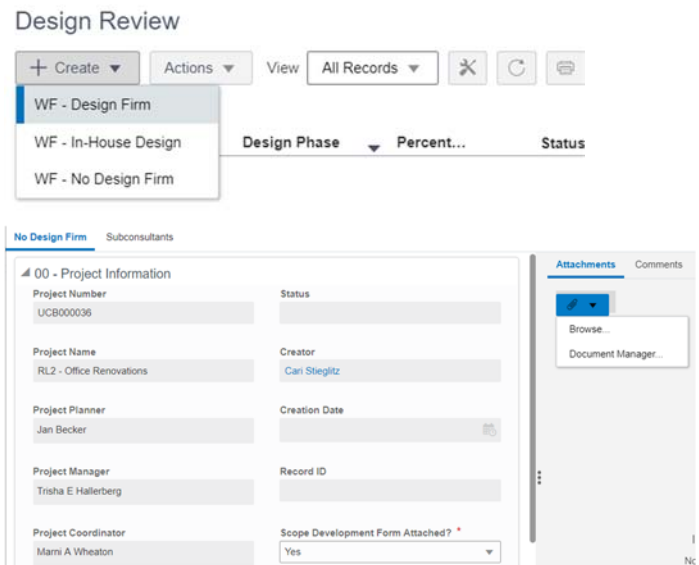
Action By Project Team

Pre-requisites None.

Related Files 3.7.5 Completing a Design Firm or In-House Design Review

Action By: Project Team **Example**

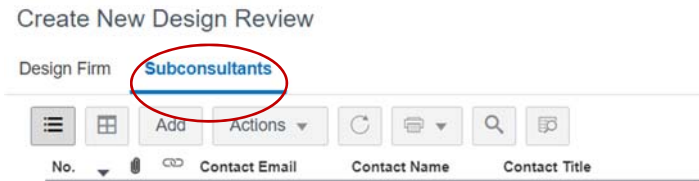
1. **Navigate** to Project>Scope Management>Design Review.
2. **Select** “Create”.
3. **Select** the No Design Firm Workflow.
4. **Attach** the scope development form and sketch.
5. **Change** “Scope Development Form Attached?” to “Yes”.



6. In 01– Project Summary **enter** a description.
Note: The project summary auto-populates from the project information form but is editable.



7. **Note** it will not be common to add Subconsultants.
8. When all information is complete, **select** “Send” from the upper right of the screen to open the Workflow Action Details screen.
 - a. Optionally **select** “Save” to save your works to your drafts folder.

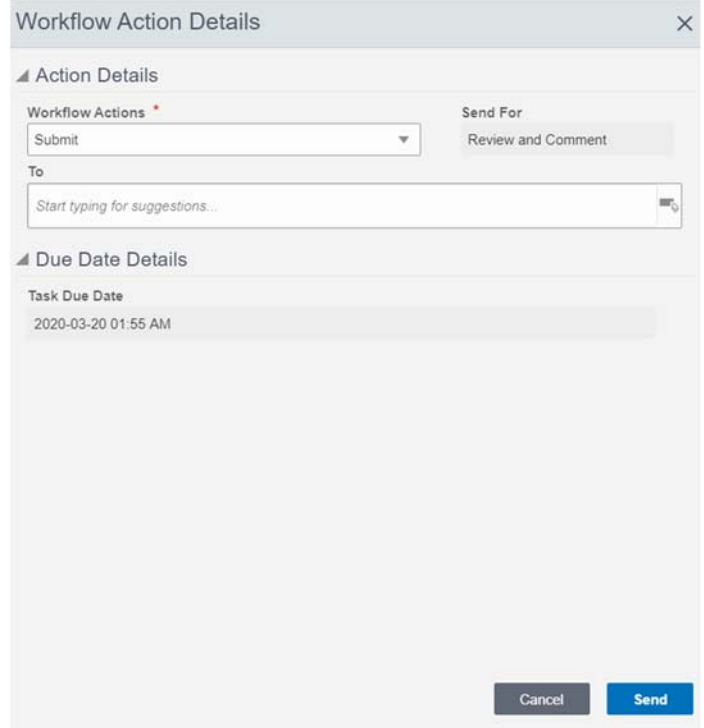


Action By: Project Team

Example

9. **Note** “Submit” is the only option and is pre-selected.
10. **Add** Reviewer(s) in the “To” field.
11. **Select** “Send”.

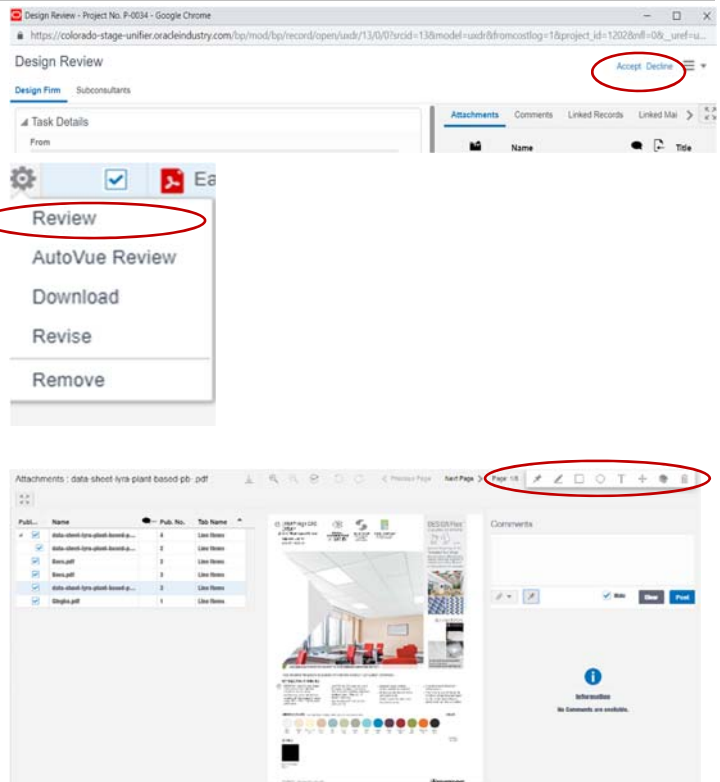
Note: Review is a CONSENSUS step in the workflow, which means every person needs to review and send on.



Action By: Reviewers

Example

12. **Open** the task and **select** “Accept” to start.
13. **Open** the scope development form to review.
14. **Click** once on the sketch to highlight.
15. **Select** the gear icon to the left of the Attachment.
16. **Select** “Review” to make annotations on the attachment.
17. **Select** the push pin icon.
18. **Note** the annotation bar in at the top of the Comments window appears.
19. **Click** on the drawing to pin a post to a specific location.
20. **Enter** a comment in the comments field.



Action By: Reviewers

Example

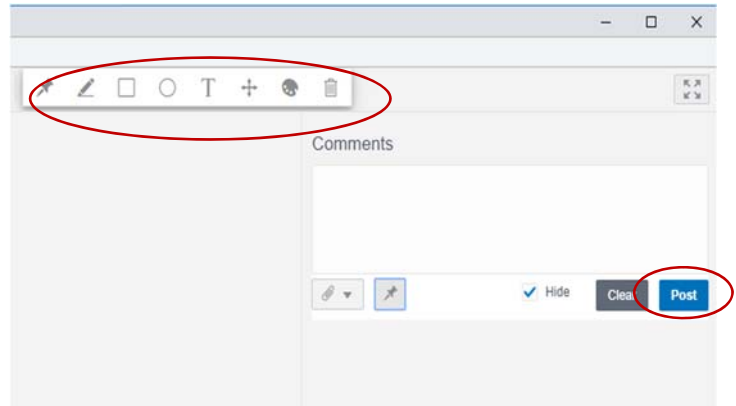
- 21. **Uncheck** the “Hide” check box.
- 22. **Select** “Post”.

- 23. **Repeat** for all review comments.

Note: Do not use the “T” in the annotation bar. Using Comments is better since they are reportable.

- a. Items will be visible on the drawing when a comment is highlighted in the comments list.

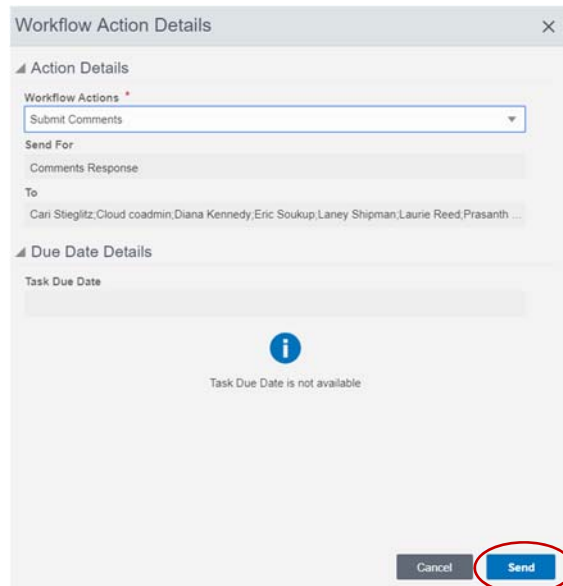
- 24. If a comment is posted as hidden, edit comment by right clicking on the pencil icon in the comment, uncheck “hide” box, and repost.



- 25. **Select** “Send” and under Workflow Actions select “Submit Comments” to send on.

- a. Optionally, select “Revise” to send back to the creator for revisions. If you do, use General Comments to let them know what revisions you are looking for.

- 26. **Select** “Send”.



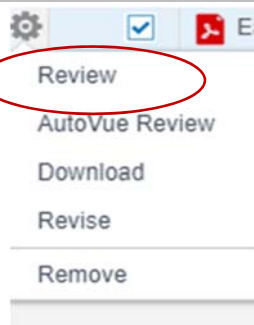
Action By: Project Team

Example

- 27. **Open** task and “Accept” to start task.
- 28. **Click** once on the sketch to highlight.
- 29. **Select** the gear icon to the left of the Attachment.
- 30. **Select** “Review” to review annotations on the attachment.

Note: Never select AutoVue Review.

- 31. **Respond** to comments.



Action By: Project Team

Example

Note: Enter an “@name” in your comment if you want to respond to a specific person.

32. **Select** “Send” to open the Workflow Action Detail screen.
33. **Select** “Approved”.
 - a. Optionally, select “Revise” to send back to the creator.
34. **Select** “Send”.

The screenshot shows a dialog box titled "Workflow Action Details". It contains a section for "Action Details" with a "Workflow Actions" dropdown menu set to "Approved". Below this are input fields for "Send For", "End", and "CC". The "CC" field has a placeholder "Start typing for suggestions...". At the bottom right, there are "Cancel" and "Send" buttons.

END TASK

3.7.7 CREATING A SUBMITTAL PACKAGE (UPDATED: 03/12/2020)

Goals How to create an initial submittal package based on an agreement. Non-workflow BP.

Navigation Project>Scope Management>Submittal Packages

Action By Project Team

Pre-requisites GC and AE discuss submittals and package breakout. Submittal Packages are created by the GC.

Related Files 3.7.7 Routing a Submittal for Approval; 3.7.10 Closing a Submittal Package

Action By: Project Team

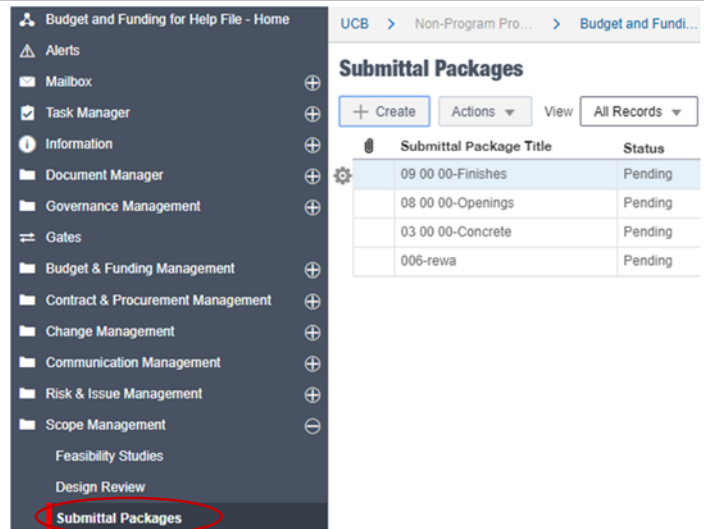
Example

1. **Navigate** to Project>Scope Management>Submittal Packages.

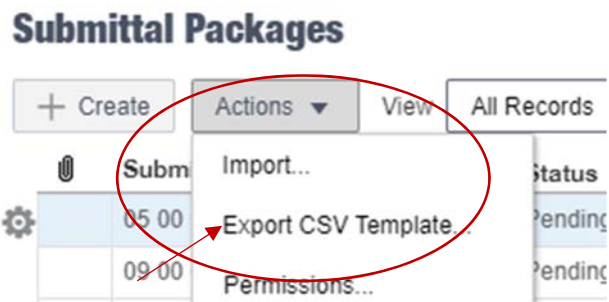
Note: The first step is to create the list of all submittal package specification numbers and titles. The second step is to attach the information via 3.7.8 Routing a Submittal for Approval.

Note: There are two methods for creating Submittal Packages; Exporting then Importing a CSV template or Creating a Submittal Package one at a time. Each method is demonstrated below.

Note: A Submittal Package is a list of all spec sections that will require submittals for the project.



2. To create Submittal Packages via Export/Import CSV template, **continue** here. Otherwise, to enter manually, skip to step 13.
3. **Select** "Export CSV Template" from the "Actions" drop-down menu.



Action By: Project Team

Example

4. "Submittal Packages Interface" template will open.
5. **Entering** data for Columns "A-C" is required. Column "A" always being "H" in this step.

Note: It is important to follow the directions at the top of the template.

6. Optionally data may be **entered** for Columns "D-F".

Note: In this step "Status" will always be "Pending". If Status is not entered at this time, the default will be "Pending".

7. **Save** the template to your computer.
8. **Select** "Import" from the "Actions" drop-down menu.

9. **Select** your saved template from your computer using the Browse button or drag the file into the window.

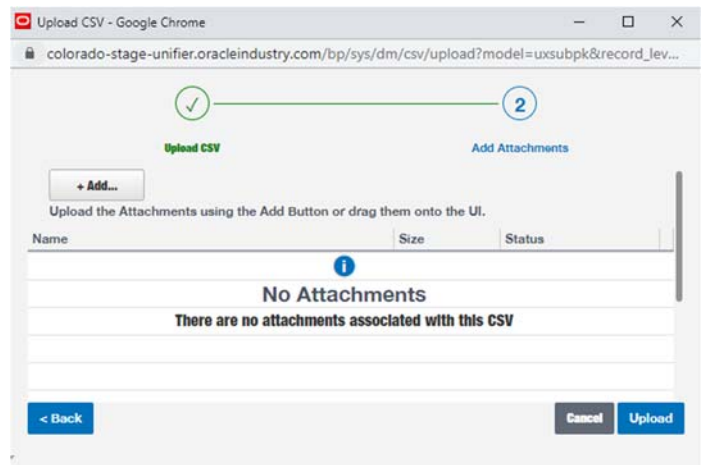
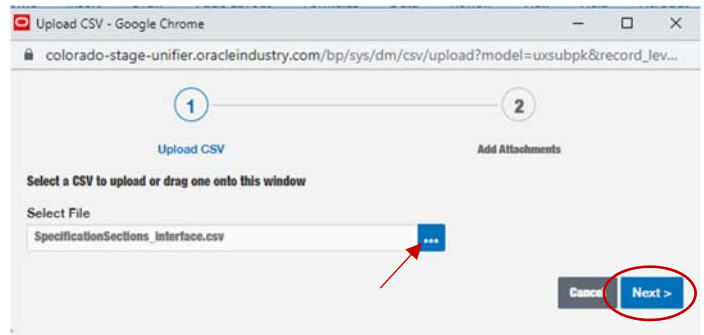
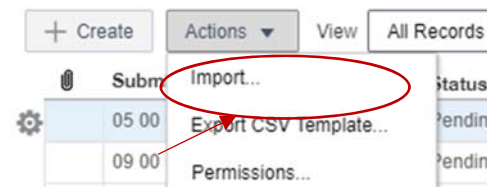
10. **Select** "Next".

11. **Select** "Upload".

Note: There are no attachments in creating Submittal Packages.

	A	B	C	D
1	Import Business Process Records			
2	Note: Do not change column structure			
3	Do not enter symbols, such as currency or digit grouping, in the numeric fields.			
4	Enter a negative numeric value using these formats only: -123456.99 or -123456,99.			
5	Please enter the attachment names separated by ':' in the next available column after the last data			
6				
7	H	Submittal Package #	Submittal Package Name	Details
8	D	Tab Name	Group Name	Description
9	H	03 00 00	Concrete	
10	H	08 00 00	Openings	
11	H	09 00 00	Finishes	
12				

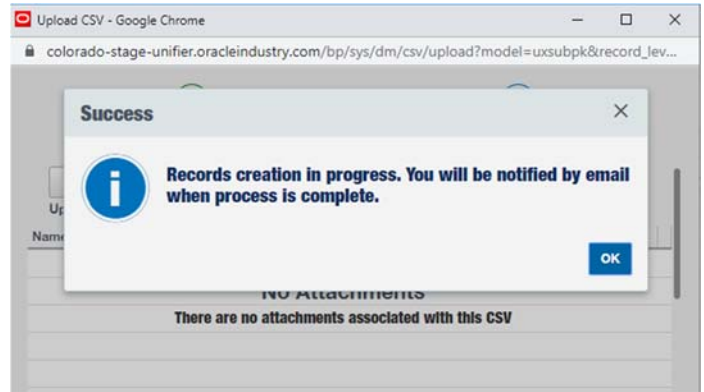
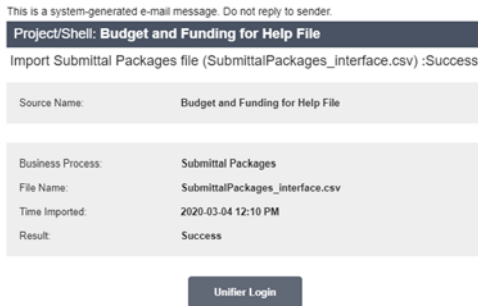
Submittal Packages



Action By: Project Team

Example

12. Select “OK”.



Creating Submittal Package Individually

13. Select “Create”.

14. Under 00 - Project Information note, **enter** data for red asterisked fields.

- a. Greyed fields will auto-populate

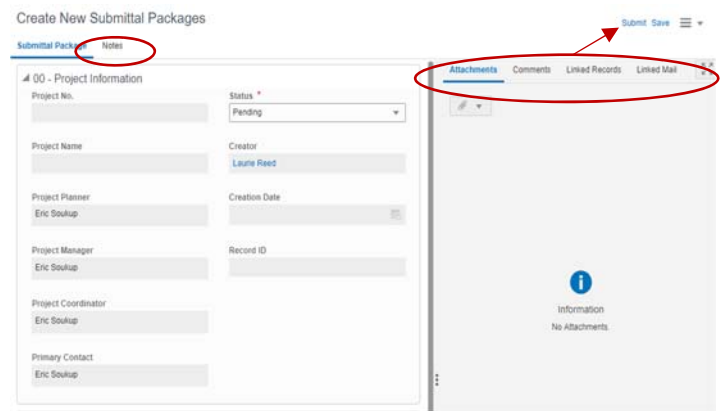
15. Notes, Attachment, Comments, etc. may be added using the buttons indicated, however, generally not useful at this time.

Note: Do NOT change status from “Pending” until all submittals in the package have been reviewed and approved or rejected.

16. Select “Submit”.

17. You now have a Submittal Packages created.

Note: Information in the log, i.e., “Status” and “# of Required Submittals” will update throughout the life of the project.



Submittal Packages

+ Create Actions View: All Records [Refresh] [Print] [Search] [Help]

Submittal Package Title	Status	# of Required Sub...	# of Approved Sub...	Proje
09 00 000-Finishes	Pending	1	0	UCB
12 00 00-Furnishings	Pending	0	0	UCB
05 00 00 -Metal	Pending	0	0	UCB
09 00 00-Finishes	Pending	0	0	UCB
08 00 00-Openings	Pending	0	0	UCB
03 00 00-Concrete	Pending	0	0	UCB
006-rewa	Terminated	0	0	UCB

Action By: Project Team

Example

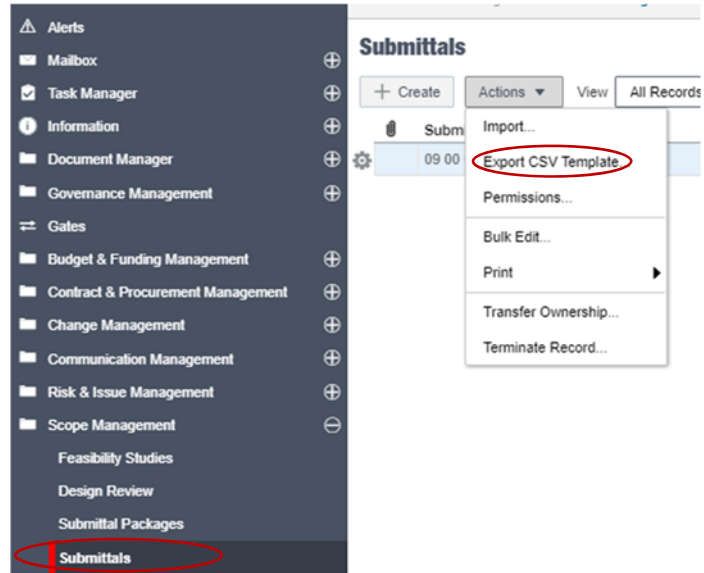
Next step is to create the submittals required within each submittal package.

Creating Submittals via import template

18. **Navigate** to Submittals

19. **Select** “Export CSV Template”

Note: This is the recommended method for projects with numerous submittal requirements. Otherwise, to enter manually, skip to step 34.



20. “Submittals Interface” template will open.

21. **Entering** data for Columns “A, C, D, E, G and H” is required. Column “A” always being “H” in this step.

Note: It is important to follow the directions at the top of the template.

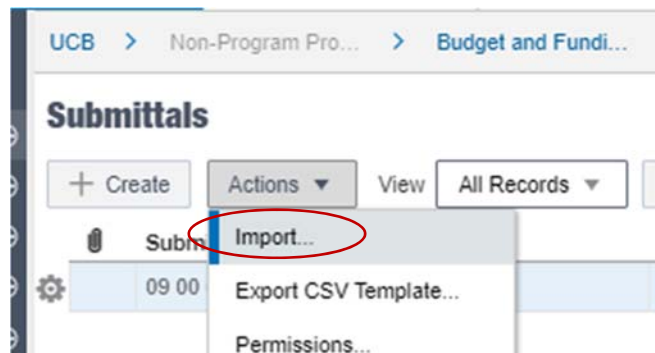
22. Optionally data may be **entered** for Columns “B and F”.

Note: In this step “Status” will always be “Pending”. If Status is not entered at this time, the default will be “Pending”.

23. **Save** the template to your computer.

24. **Select** “Import” from the “Actions” drop-down menu.

	A	B	C	D	E	F	G	H	I
1	Import Business Process Records								
2	Note: Do not change column structure								
3	Do not enter symbols, such as currency or digit grouping, in the numeric fields.								
4	Enter a negative numeric value using these formats only: -123456.99 or -123456,99.								
5	Please enter the attachment names separated by ':' in the next available column after the last data element present fo								
6									
7	H	Status	Submittal Title	Submittal Description	Submittal Release Su	Revision Sequencing	Submittal Scope / Re		
8	D	Tab Name	Group Name	Description					
9	H		Product Data	1 Document		Rev's A - Z	SPKG-00001		
10	H		Mix Design	2 Document		Rev's A - Z	SPKG-00001		
11	H		Rebar Shop Dwgs	3 Drawing		Rev's A - Z	SPKG-00001		
12	H		Placement Dwgs	4 Drawing		Rev's A - Z	SPKG-00001		
13	H		Mfr Install Instr	5 Document		Rev's A - Z	SPKG-00001		
14	H		Mfr Cert	6 Document		Rev's A - Z	SPKG-00001		
15	H		LEED	7 Document		Rev's A - Z	SPKG-00001		
16	H		LEED	1 Document		Rev's A - Z	SPKG-00009		
17	H		Shop Dwgs	2 Drawing		Rev's A - Z	SPKG-00009		

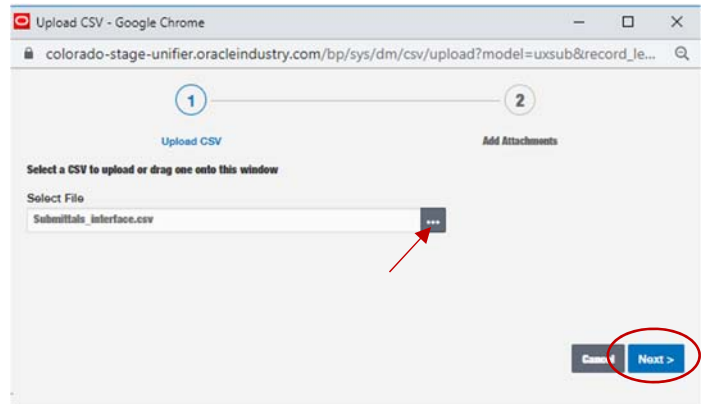


Action By: Project Team

Example

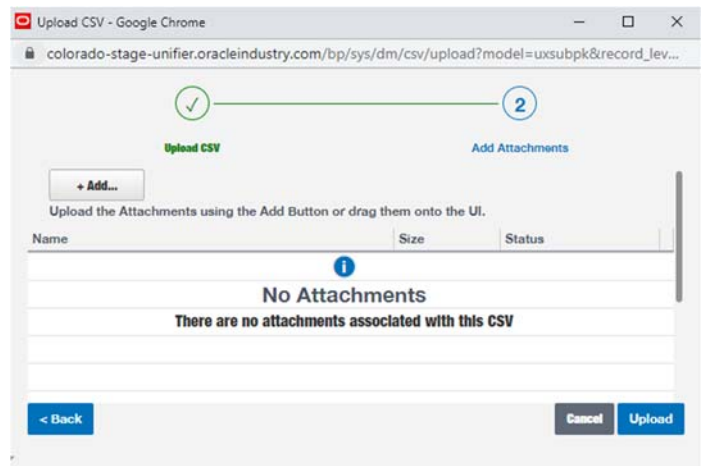
25. **Select** your saved template from your computer using the Browse button or drag the file into the window.

26. **Select** “Next”.

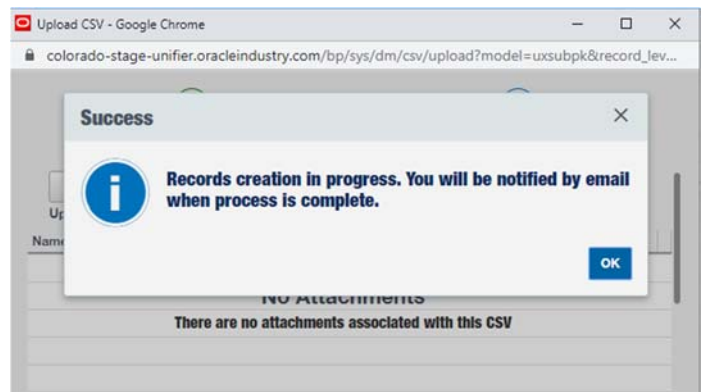
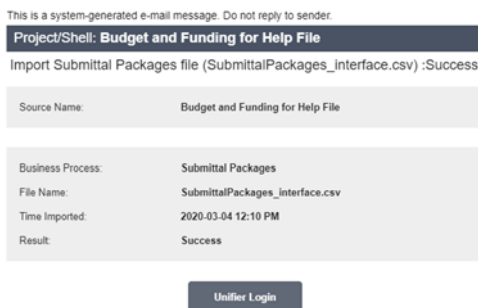


27. **Select** “Upload”.

Note: There are no attachments in creating Submittal Packages.



28. **Select** “OK”.



29. A list of all Submittals is now created.

Submittals

Submitt...	L...	Contractor	Decision	Submittal Package Name	Project Manager	Project Planner	Record ID
06 21 16-6				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00013
06 21 16-5				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00012
06 21 16-4				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00011
06 21 16-3				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00010
06 21 16-2				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00009
06 21 16-1				06 21 16-P-Lam-Faced Architect...	Eric Soakup	Eric Soakup	SUBM-00008
03 00 00-7				03 00 00-Concrete	Eric Soakup	Eric Soakup	SUBM-00007
03 00 00-6				03 00 00-Concrete	Eric Soakup	Eric Soakup	SUBM-00006
03 00 00-5				03 00 00-Concrete	Eric Soakup	Eric Soakup	SUBM-00005

Action By: Project Team

Example

30. To view a list of submittals specific to a submittal package, **navigate** to “Submittal Packages”.

31. **Double-click** the submittal package.

Note: The “# of Required Submittals” is now populated.

Submittal Package Title	Status	# of Required Sub...
09 91 23-Interior Painting	Pending	0
09 68 13-Tile Carpeting	Pending	0
09 51 13-Acoustical Panel Ceilings	Pending	0
09 29 00-Gypsum Board	Pending	0
08 80 00-Glazing	Pending	0
08 71 00-Door Hardware	Pending	0
08 14 16-Flush Wood Doors	Pending	0
08 11 13-Hollow Metal Doors an...	Pending	0
06 21 16-P-Lam-Faced Architect...	Pending	6
06 20 23-Interior Finish Carpentry	Pending	0
05 21 00-Steel Joist Framing	Pending	0
05 12 00-Structural Steel	Pending	0
03 40 00-Precast Concrete	Pending	0

32. Submittal package opens in a new window.

33. The full list of submittals is found under “Submittals” at the top of the page.

Note: “Notes” will rarely be used.

Submittal Package	Notes	Submittals	# ...	L...	Contra
06 21 16-6	Product Certs	Other	0		
06 21 16-5	Qualifications	Other	0		
06 21 16-4	Samples - Verify	Material Item	0		
06 21 16-3	Samples - Initial	Material Item	0		
06 21 16-2	Shop Dwg	Drawing	0		
06 21 16-1	LEED	Document	0		

34. To create submittals manually instead of import, **navigate** to Scope Management>Submittals.

35. **Select** “Create”.

Submitt...	L...	Contractor
06 21 16-6		
06 21 16-5		
06 21 16-4		
06 21 16-3		
06 21 16-2		
06 21 16-1		
03 00 00-7		
03 00 00-6		
03 00 00-5		
03 00 00-4		
03 00 00-3		
03 00 00-2		
03 00 00-1		

Action By: Project Team

Example

36. In Section 00 – Project Information **note** greyed fields will auto-populate.

Note: “Status” will remain “Pending” until the submittal reaches a terminal status.

37. In Section 01 – Submittal Details **enter** data for red asterisked fields

38. Optionally **select** the “Submittal Type”

Note: Release Submittal? must be No until you are ready for your first submittal revision, which sends the submittal to the Contractor.

39. In 02 – Related Submittal Package Details **select** the Submittal Package Record # from the picker.

The screenshot displays the 'Create New Submittals' form, organized into three main sections:

- 00 - Project Information:** Contains fields for Project Number (UCB000066), Project Name (Budget and Funding Test Project), Project Planner (Eric Soukup), Project Manager (Eric Soukup), Project Coordinator (Eric Soukup), and Primary Contact. A Status dropdown is set to 'Pending'. The Creator is listed as Laurie Reed. Creation Date and Record ID fields are present but greyed out.
- 01 - Submittal Details:** Contains fields for Submittal Title (red asterisk), Submittal Identifier, Submittal ID - Suffix, and Submittal Type (dropdown menu with options: Select, Drawing, Document, Material Item, Other). It also includes Release Submittal? (dropdown set to 'Select'), Submittal Released Date, Total # of Revisions (0), and Revision Sequencing (dropdown set to 'Type a Revision Sequence Title...').
- 02 - Related Submittal Package Details:** Contains fields for Submittal Package Record # (dropdown set to 'Type a Record ID...') and Submittal Package Title. A Submittal Package # field is also present but greyed out.

Action By: Project Team

Example

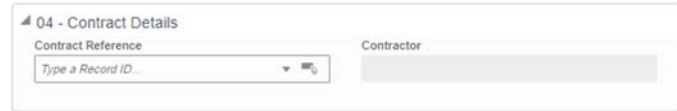
40. Optionally, **enter** data for Sections 03
04.



03 - Other Information
Scope / Requirement Details

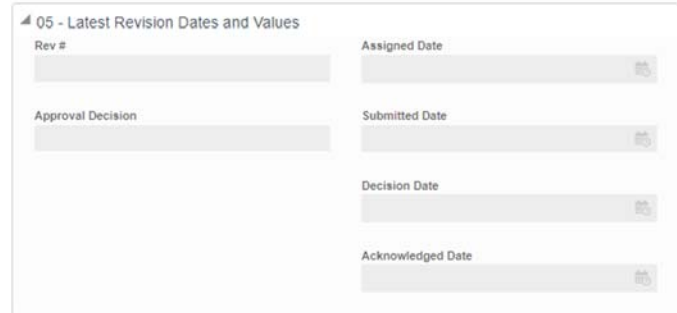
A large empty text input field for entering scope or requirement details.

41. In Section 05 – Latest Revision Dates
and Values, greyed fields will
populate as appropriate.



04 - Contract Details

Contract Reference: Contractor:

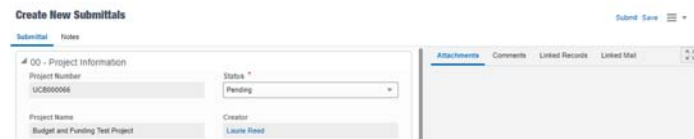


05 - Latest Revision Dates and Values

Rev #	Assigned Date
<input type="text"/>	<input type="text"/>
Approval Decision	Submitted Date
<input type="text"/>	<input type="text"/>
	Decision Date
	<input type="text"/>
	Acknowledged Date
	<input type="text"/>

42. **Select** “Submit”

43. **Repeat** steps to create additional
submittals.



Create New Submittals

Submittal Notes

00 - Project Information

Project Number: UCB00006	Status: Pending
Project Name: Budget and Funding Test Project	Creator: Louise Eber

Attachments | Comments | Linked Records | Linked Mail

END TASK

3.7.8 ROUTING A SUBMITTAL FOR APPROVAL (UPDATED: 03/12/2020)

- Goals** How to initiate and route a submittal for review and approval.
- Navigation** Project>Scope Management>Submittal
- Action By** Project Team
- Pre-requisites** Ready to submit the first submittal.
- Related Files** 3.7.7 Creating Submittal Package
3.7.11 Closing a Submittal Package

Action By: Project Team

Example

1. **Navigate** to Project>Scope Management>Submittal.
2. **Double-click** on the Submittal to open the Submittal from the list.

Submitt...	L...	Contractor	Decision	Submittal Packa
03 00 00-7				03 00 00-Concret
03 00 00-6				03 00 00-Concret
03 00 00-5				03 00 00-Concret
03 00 00-4				03 00 00-Concret
03 00 00-3				03 00 00-Concret
03 00 00-2				03 00 00-Concret
03 00 00-1				03 00 00-Concret
06 21 16-6				06 21 16-P-Lam-F
06 21 16-5				06 21 16-P-Lam-F
06 21 16-4				06 21 16-P-Lam-F
06 21 16-3				06 21 16-P-Lam-F
06 21 16-2				06 21 16-P-Lam-F
06 21 16-1				06 21 16-P-Lam-F

3. **Select** "Edit"

Submittals

Submittal Notes Revisions

4 00 - Project Information

Project Number	Status
UCB000066	Pending
Project Name	Creator
Budget and Funding Test Project	Laure Reed

Attachments Comments Linked Records Linked >

4. In Section 01 – Project Information greyed fields will auto-populate.
5. “Status” to **remain** “Pending”.

6. In 01 – Submittal Details, **change** “Release Submittal?” to “Yes”.

Note: Selecting “No” in “Release Submittal?” is typically only used if it is determined the submittal is not needed.

7. **Select** “Submit” to create the first Submittal Revision. This sends the submittal to the Contractor as a task.

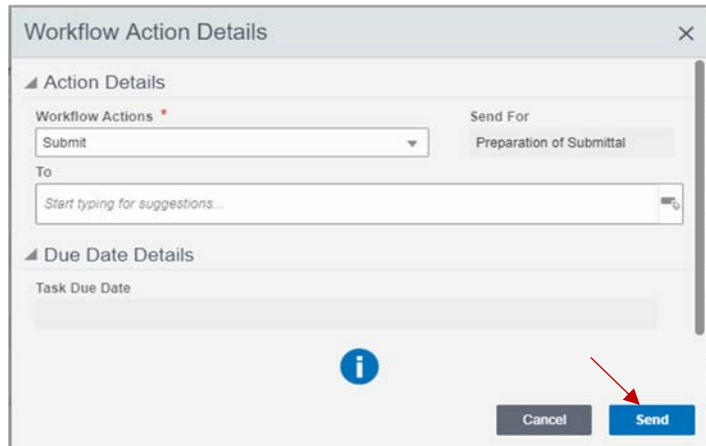
8. The Contractor **locates, opens, and accepts** the task.

9. Contractor reviews the type of submittal required.

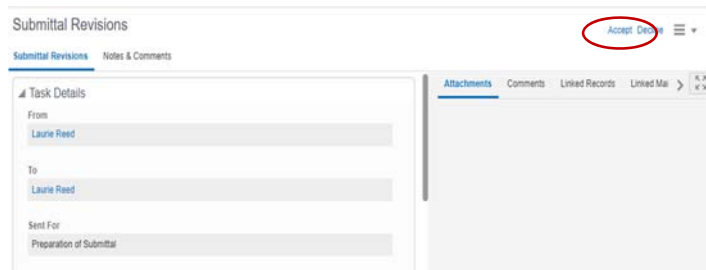
10. **Select** “Send”.

11. **Note** in this step “Submit” is the only option and is pre-selected.
12. “To” field is required, and Recipient(s) must be selected
13. **Select** “Send” to send the submittal for Preparation of Submittal.

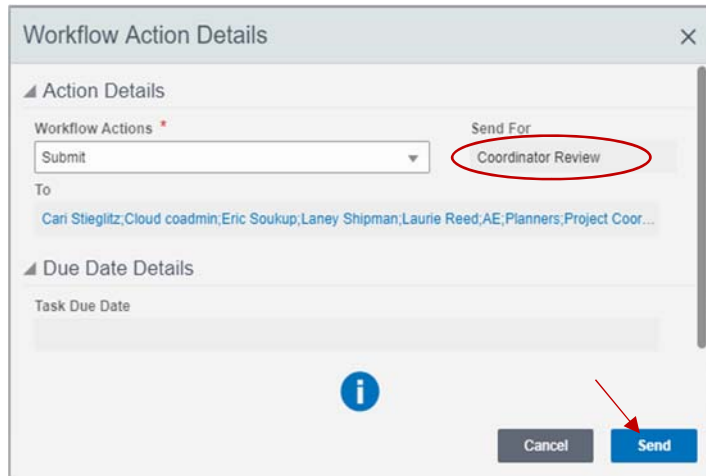
Note: User who initiates the revision may also be the person preparing the submittal. In this case, select your own name. In the future, Vendors will prepare the submittal.



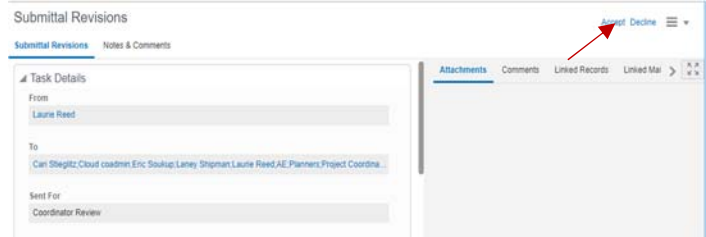
14. **Open** and **accept** the Submittal Revision.
15. **Add** attachments, notes and comments as required by the submittal.



16. **Select** “Send” to open the Workflow Action Details screen.
17. In this step “Submit” is your only option
18. **Select** “Send” to send the Submittal Revision for Coordinator Review.

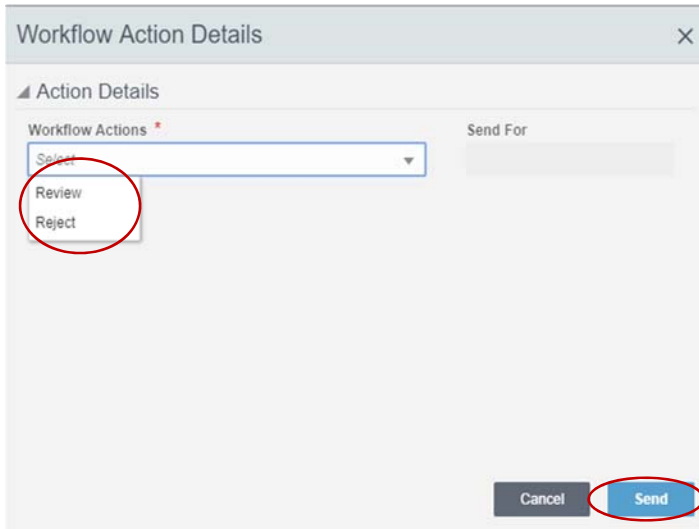
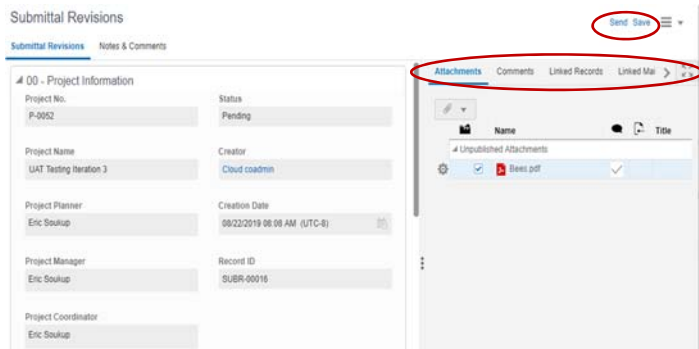


19. Coordinator **locates, opens and accepts** the task

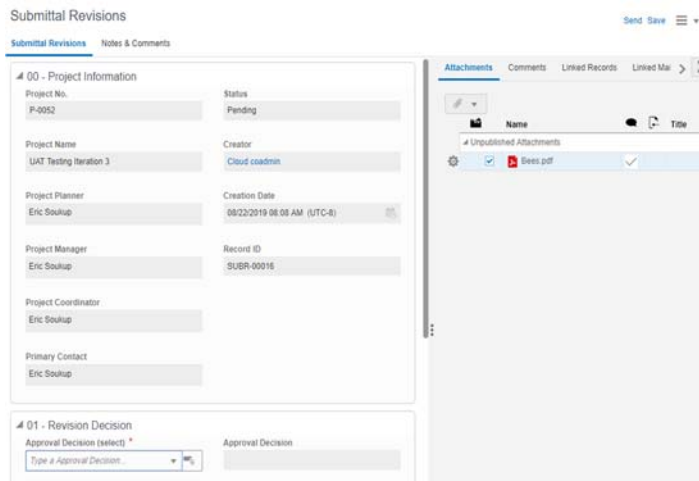


20. **Review** all information provided.
21. **Open** attachments and review.

Note: Intent of this step is to ensure the Contractor has submitted full and correct documents.
22. **Enter** Notes & Comments, Attachments, etc. as necessary
23. **Select** “Send” to open the Workflow Action Details screen.
24. **Select** “Review” to send the Submittal for Submittal Response. “To” field is required and User Selected.
 - a. Optionally, **select** “Reject” to send the Submittal for Submitter Rejection Notification. “To” field is auto populated with the submitter.
25. **Select** “Send”.



26. Architect locates, opens, and accepts the task.
27. Reviews and revisions until all reviewers have completed their review.



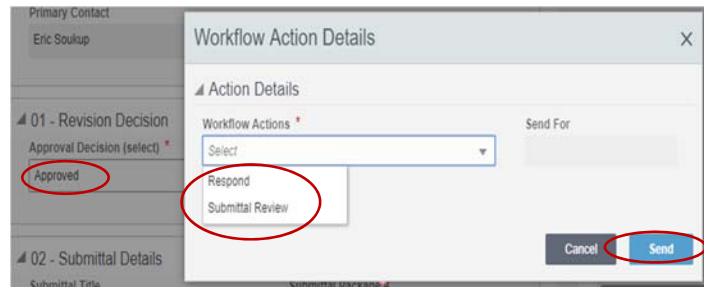
28. After review, **select** the approval decision in 01 – Revision Decision.
29. **Select** one of the following approval decisions from the Submittal Revision Approval Codes list.
30. **Select** “Send” to open the workflow Action Details screen.
 - a. “Approved” – Submittal is approved.
 - b. “Approved as Noted” – Approved with notations.
 - c. “Pending Review” – Submittal is being routed to other entities for review, such as, Codes, Mechanical, etc. Pending Review is a consensus review. All parties must comment.
 - d. “Rejected” – Not approved. Terminal step: a new revision is created, and the process begins at Assignment step.
 - e. “Revise and Resubmit” – needs revision. Terminal step: a new revision is created, and the process begins at Assignment step.

Submittal Revision Approval Codes

[Search](#) | [Find on Page](#)

Approval Decision	Status
Approved	Active
Approved as Noted	Active
Pending Review	Active
Rejected	Active
Revise and Resubmit	Active

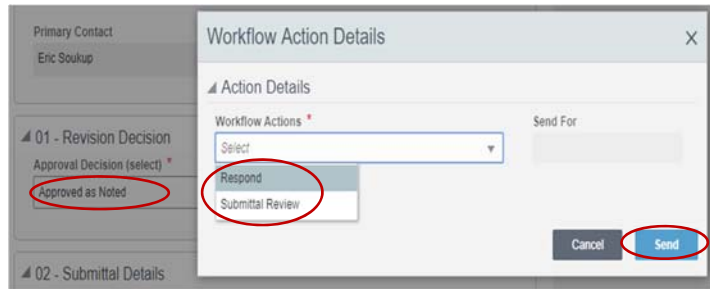
31. If “Approved” is selected:
 - a. “Respond” sends the Submittal for Submitter Approval Notification.
 - i. Optionally, select “Submittal Review” to send for Submittal Review and Respond back to Submittal Response.



32. **Select** “Send”.

33. If “Approved as Noted” is selected:

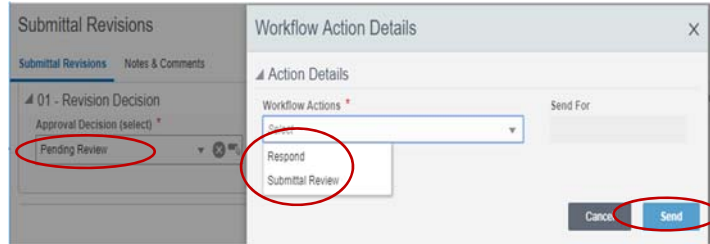
- a. “Respond” sends the Submittal for Submitter Approval Notification
- b. “Submittal Review” sends for Submittal Review and Respond back to Submittal Response



34. **Select** “Send”.

35. If “Pending Review” is selected:

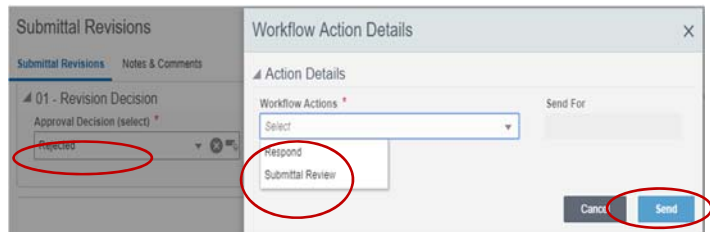
- a. “Respond” sends the Submittal for Submittal Response
- b. “Submittal Review” sends for Submittal Review and Respond back to Submittal Response



36. **Select** “Send”.

37. If “Rejected” is selected:

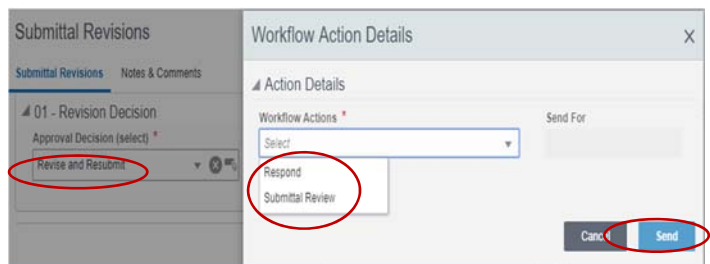
- a. “Respond” sends the Submittal for Submitter Rejection Notification
- b. “Submittal Review” sends for Submittal Review and Respond back to Submittal Response



38. **Select** “Send”.

39. If “Revise and Resubmit” is selected:

- a. “Respond” sends the Submittal for Submitter Rejection Notification
- b. “Submittal Review” sends for Submittal Review and Respond back to Submittal Response

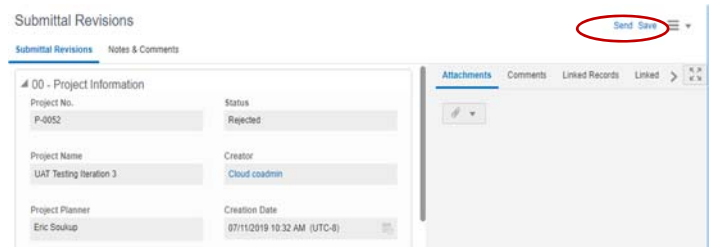


40. **Select** “Send”.

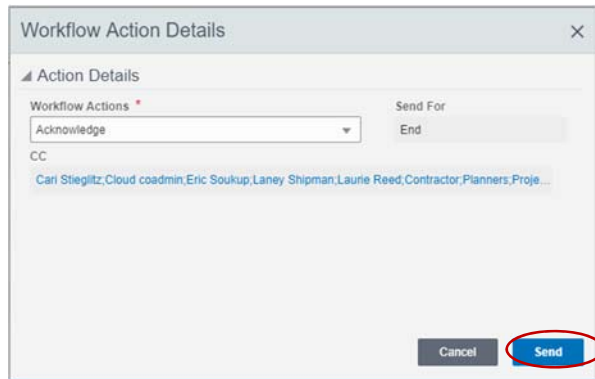
41. **Repeat** reviews until the approval decision is Submitter Approved, Approved as Noted, or Rejection.

42. **Review** all information provided. **Add** notes and comments as needed.

43. Select “Send” to open the Workflow Action Details screen.



44. In this step Acknowledge is the only option. This is a terminal step for the Business Process.



END TASK

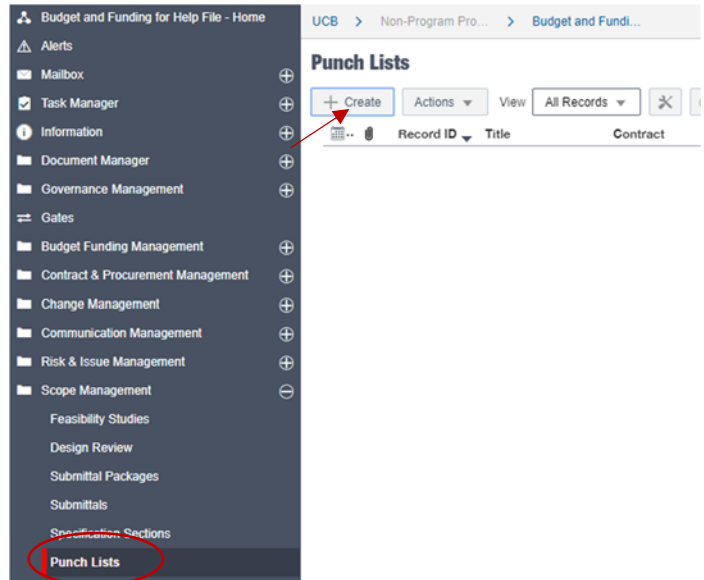
3.7.9 COMPLETING PUNCH LISTS (UPDATED 1/27/2020)

- Goals** How to complete and route a punch list.
- Navigation** Project>Scope Management>Punch Lists
- Action By** Project Manager / Project Coordinator / Planner / AE / Contractor
- Pre-requisites** None.
- Related Files** None.

Action By: Project Manager / Project Coordinator / Planner / AE / Contractor

Example

1. **Navigate** to Project>Scope Management>Punch List
2. **Select** "Create".

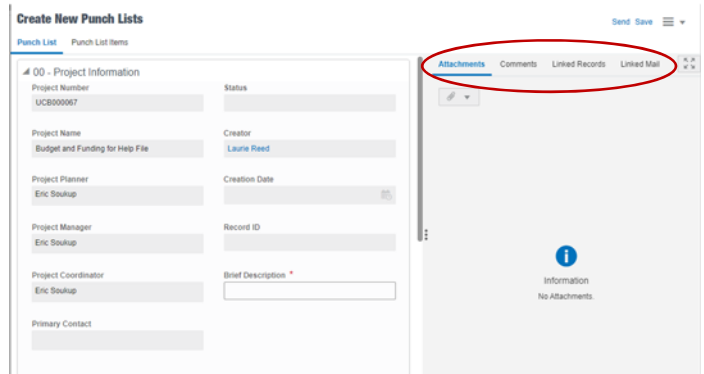


3. In 00-Project Information, **enter** data for red asterisked fields.

Note: Use this field to note area for the punch list.

- a. Greyed fields will auto-populate as appropriate.

4. **Enter** Notes & Comments, Attachments, etc. as necessary.



5. **Select** the Contract related to the Punch List.

Note: the Contract Name and Vendor name auto populate.

Note: the Requirements description auto populates and is not editable.

The screenshot shows two sections of a form. The first section, '01 - Contractor Information', contains a 'Contract' dropdown menu with the placeholder text 'Type a Record ID...', a 'Contractor' text input field, and a 'Vendor Name' text input field. The second section, '02 - Requirements', contains a 'Description' text area with the text: 'All punch list items must be complete by the contractor and approved by the design firm prior to final acceptance, settlement, or release of retainage.'

6. **Select** the Punch List Items tab to start adding punch list items.

7. **Select** "Add" to add the first item noted.

The screenshot shows the 'Create New Punch Lists' interface. The 'Punch List Items' tab is selected and circled in red. Below the tabs is a toolbar with an 'Add' button, which is also circled in red and has a red arrow pointing to it. Other buttons in the toolbar include 'Actions', a refresh icon, a trash icon, a search icon, and a help icon. Below the toolbar is a table header with columns: 'No.', 'Short Descripti...', 'Priority', 'Assigned To', and 'Start Date'.

8. In 00- Follow Up Action Details **enter** data for the red asterisked fields.

Note: "Short Description": Enter the main title of the punch list item. Description should contain more specific information on the Action.

Note: "Assigned To": will be responsible for closing out the punch list item within the system. They must be a user in Unifier.

The screenshot shows the 'Line Item Details' form for '00 - Follow Up Action Details'. The form contains several fields, each with a red asterisk indicating it is required: 'Short Description', 'Description', 'Due Date', 'Assigned To', and 'Company'. The 'Short Description' field is a text input. The 'Description' field is a larger text area. The 'Due Date' field is a date picker with the placeholder 'YYYY-MM-DD'. The 'Assigned To' field is a dropdown menu with the placeholder 'Type a Name...'. The 'Company' field is a text input.

9. In 00–Follow Up Action Details (cont.) **enter** data for red asterisked fields.

- a. External Assignee: Choose whether the person assigned is external to the system. This could be used when the person responsible is not a user in Unifier.

Note: Ext. Company Name is a mandatory field if “External Assignee” is “Yes”. If “No” is selected the field is greyed out.

Note: External Assignee Name is a mandatory field if “External Assignee” is “Yes”. If “No” is selected the field is greyed out.

- b. Action Item Approver: Select the user that will approve or validate the punch list item is complete. They must be a user in Unifier.

10. **Select** “Save” to save the current entry

- a. Optionally, select “Save & Add New” to save the current entry and add a new Line Item.

11. **Select** “Cancel” to cancel the current entry.

12. **Repeat** each Punch List Item until all individual actions are captured.

13. **Select** “Send” in the top right-hand corner.

Note: 01-Resolution Details will be auto-populated from an associated Action Item record, if one exists.

Send Save

Line Item Details

Priority *
Select

External Assignee?
Select

Ext. Company name

External Assignee Name

Action Item Approver *
Type a Name...

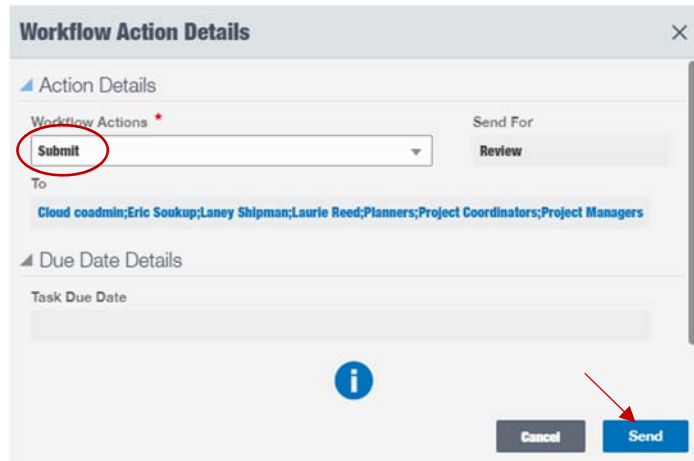
Action Item Approver Email

01 - Resolution Details
The fields below will be auto-populated from the associated action

Cancel Save Save & Add New

14. **Note** in this step “Submit” is the only option.

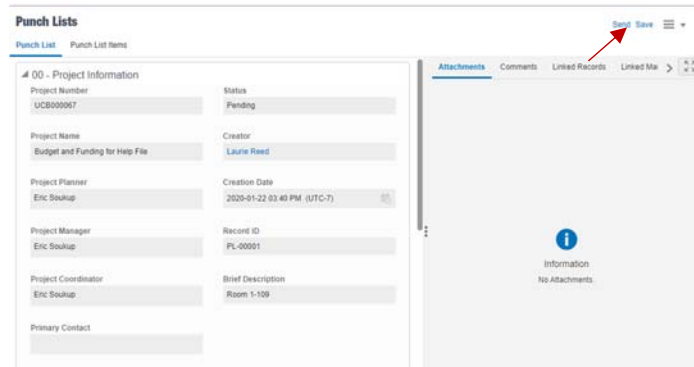
15. **Select** “Send”.



16. Assignee locates, opens and accepts the record.

17. **Review** all information.

18. **Select** “Send”.

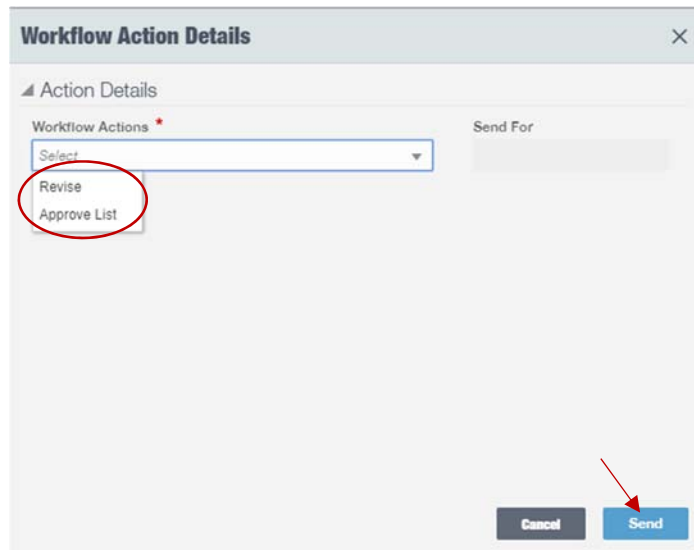


19. **Select** “Approve List” sends to Punch List Closeout.

- a. Optionally, **select** “Revise” sends the Punch List to the Creator to revise and resubmit.

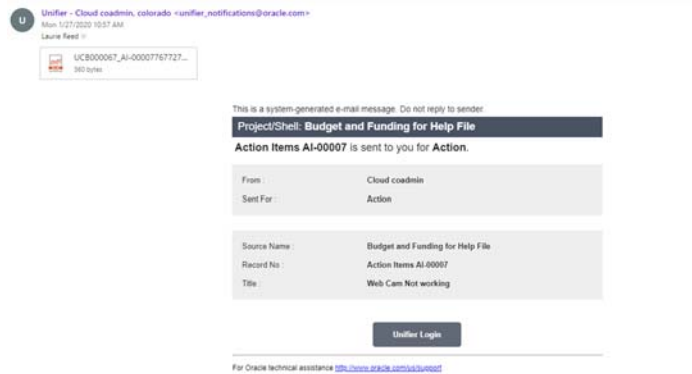
Note: An Action Item will be auto created once the Punch list is Approved.

20. **Select** “Send”.



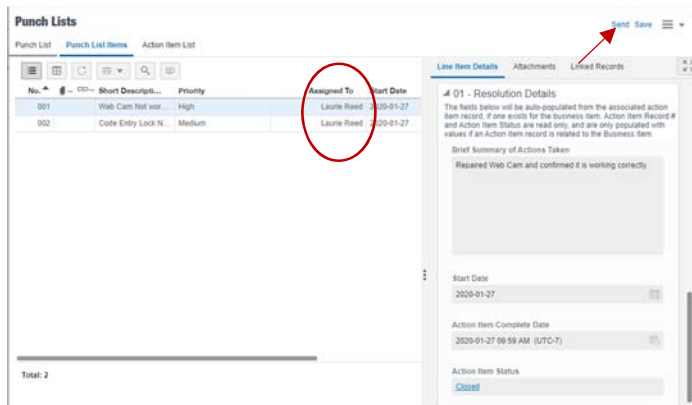
- Each Punch List “Assigned To” will be notified of a new “Action Item”.

Note: Action Item “Assigned To” will update the Action Item business process once they have completed the assigned Action (Punch List Item).



- Action Item Approver will periodically review the Punch List record to view status of each “Punch List Item”.

Note: Status of each punch list item is visible in 01 – Resolution Details. A hyper link to the Action Item in “Action Item Status” will take you to the Action Item record.

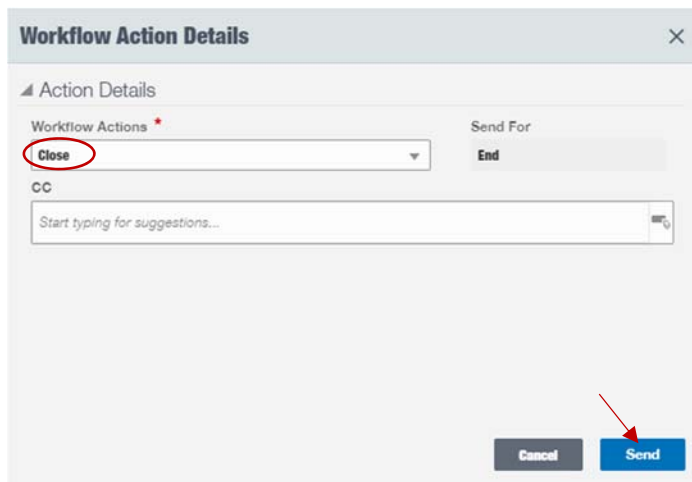


- After all Action Items are “Closed”, the record is ready to be closed

- Select** “Send”.

- In this step “Close” is the only option and is a terminal step for the business process.

- Select** “Send”.



END TASK

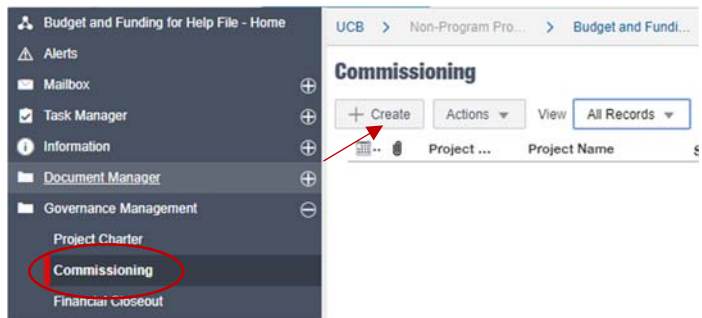
3.7.10 COMPLETING COMMISSIONING (UPDATED 03/04/2020)

- Goals** How to complete commissioning.
- Navigation** Project>Governance Management>Commissioning
- Action By** Cx Authority
- Pre-requisites** None
- Related Files** Cx Plan

Action By: Cx Authority

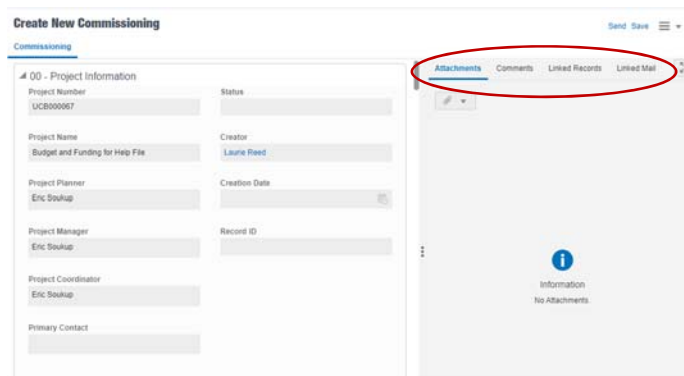
Example

1. **Navigate** to Project>Governance Management>Commissioning
2. **Select** “Create”



3. In 00 – Project Information, **note** greyed fields will auto-populate.
4. **Enter** Attachments, Comments, etc. as necessary

Note: The Cx plan will be attached via “Attachments”.



5. **Select** Internal or External Cx Authority
6. **Enter** data for red asterisk fields
 - a. If an External Cx Authority is used, a single Point of Contact must be identified, and data entered for all red asterisk fields.
 - b. If an Internal Cx Authority is used, red asterisk fields will auto-populated once a "Contact" is selected, except Contact Phone # must be entered. Fields in the right hand column will be greyed out.

7. **Select** "Send".
8. **Select** Workflow Action as appropriate. Workflow Action options will display according to the current phase
9. **Select** "Send".

Note: A Concept may, or may not, be used. However, the process must at least begin at SD.

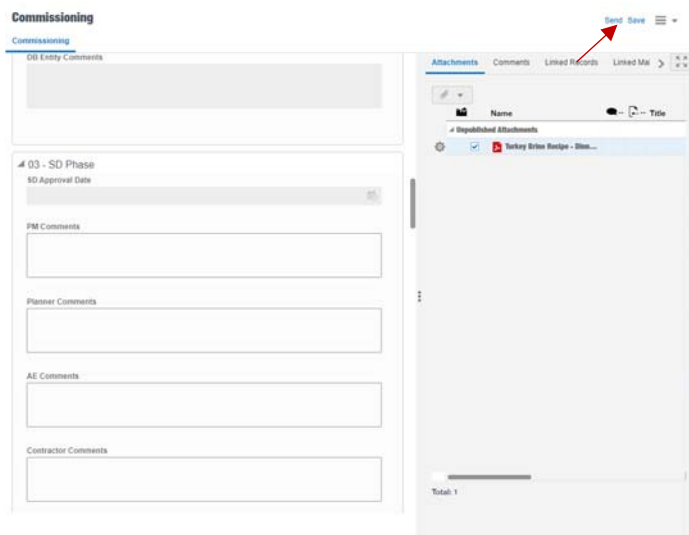
Note: consider adding the Internal Reviewer e.g. Engineering, Operations, Utilities, etc.

10. Reviewer locates, opens record and accepts the task.

11. The Cx plan is reviewed and submits comments.

Note: Only fields in the current phase will be available for comments. Fields in all other phases will be greyed out.

12. **Select** “Send”.



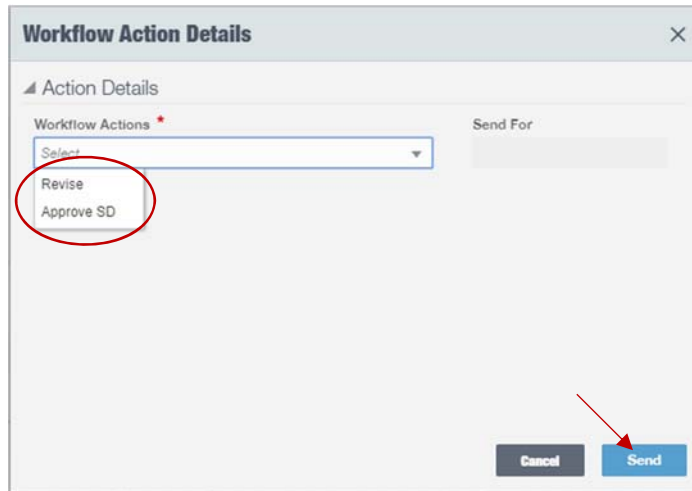
13. **Select** “Approve SD” to send the business process to the Update step.

- a. Optionally, **select** “Revise” sends the business process for revise and resubmit.

14. **Select** “Send”.

Note: The same process will be followed for each Phase.

Note: Approval at each Phase is a Consensus Approval, meaning all Reviewers must respond, and eventually approve before the next Phase will be able to advance.



END TASK

3.7.11 CLOSING A SUBMITTAL PACKAGE (UPDATED: 1/23/2020)

Goals How to close out a submittal package.

Navigation Project>Scope Management>Submittal Package

Action By Project Manager (PM) / Project Coordinator (PC) / Planner / AE / Contractor

Pre-requisites All submittals/revisions complete and approve in the package.

Related Files Submittal records

Action By: PM / PC / Planner / AE / Contractor

Example

1. **Navigate** to Project>Scope Management>Submittal Package

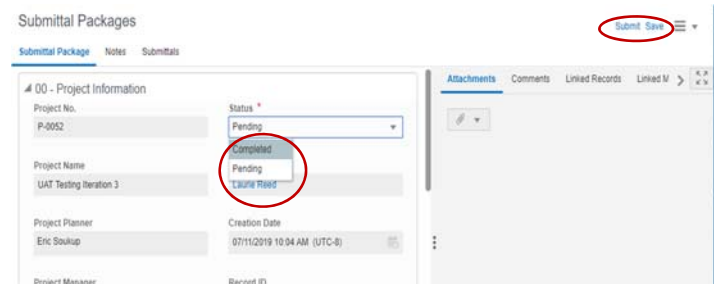
Note: Only when all submittals in the package are approved or rejected the Submittal Package can be closed.

2. **Select** “Edit”.

3. **Change** the status to “Completed”.

4. **Select** “Submit”.

Note: All Submittal Packages must be closed for a project to be closed.



END TASK

3.8 TIME MANAGEMENT

3.8.0 INTRODUCTION

Time management is about not only managing the construction schedule, it is also about managing the owner milestones that help consistency in rolling projects up to a portfolio level in a single view.

Managing schedules in PDS include the default milestone schedule. For contractor schedules, they can be uploaded into the document manager as a PDF as well as optionally imported directly into Unifier.

3.8.1 MANAGING THE PROJECT MILESTONE SCHEDULE (UPDATED: 03/04/2020)

- Goals** How to update the template milestone schedule.
- Navigation** Project > Time Management > Schedule Sheet
- Action By** Project Team
- Pre-requisites** None.
- Related Files** None.

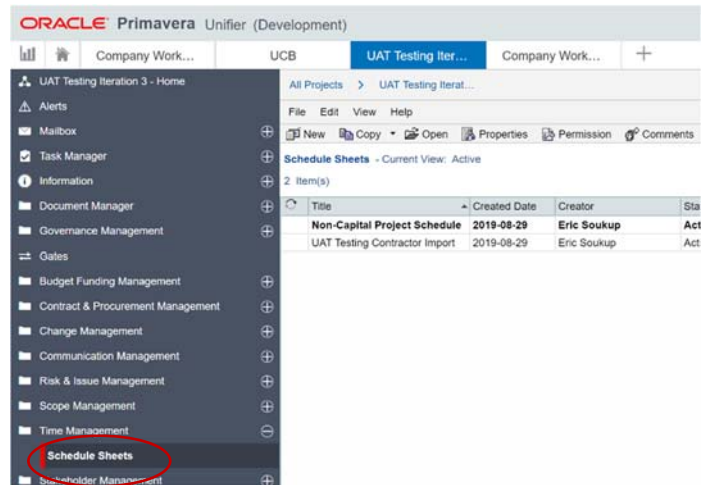
Action By: Project Team

Example

- Navigate** to Time Management > Schedule Sheet and double-select on “Non-Capital Project Schedule” or “Capital Project Schedule” to open.

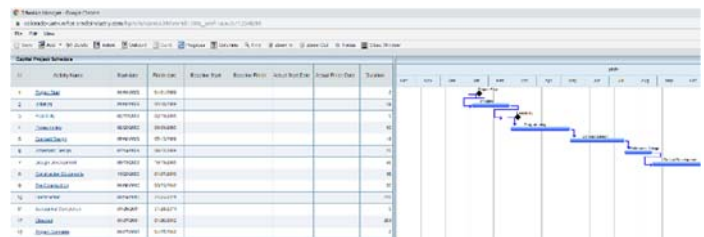
Note: Available schedule type is determined by the project shell.

- The schedule sheet will open.



- In the schedule sheet, **note** that there are standard milestones by default.

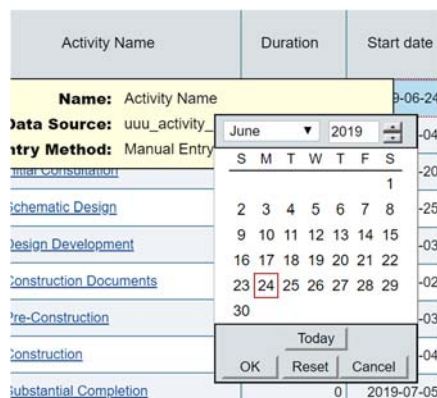
Note: DO NOT modify the name of the standard milestones.



- Change** the Start Date and Finish Date to reflect the forecasted dates to occur.
- To change, **double select** on the date field and select a new date from the calendar.
- Select** “OK” to save the new date.

Note: Successive activities’ start dates update based upon the predecessor finish date.

- Select** “Save” at the end before closing the window.



Action By: Project Team

Example

7. To add additional milestones, **select** once on the row that the new milestone should be added.
8. **Select** “Add” then “Manual” to add a new milestone.

Id	Activity Name	Duration	Start date	Finish
1	Project Start	0	2019-06-24	2019
2	Initiating	9	2019-06-04	2019
4	Initial Consultation	1	2019-06-20	2019
5	Schematic Design	1	2019-06-25	2019
6	Design Development	1	2019-07-03	2019

9. **Enter** all required information at a minimum about the new milestone.
 - a. Activity Name: The name of the milestone.
 - b. Start date: The start date of the milestone.
 - c. Finish date: The end date of the milestone.
 - d. Duration: Should be 1 for a milestone.
 - e. Define Dependencies for the new milestone and its relation to existing milestones.

Activity Properties - Google Chrome

colorado-stage-unifier.oracleindustry.com/bp/sch/activity/addedit?sheet_id=15&id=-1&modifySchedule...

General | CBS Codes | Resource | Dependencies

General

Activity Id: 0 Activity Name: [text box]

P6 Activity Number: [text box] Activity Constraint: As Soon As Possible

Calendar: 24x7 Calendar Show as Milestone:

Predecessor: [text box] WBS Codes: [text box]

Assigned Resources: [text box] P6 CBS: [text box]

Dates

Start date: 2019-10-23 Finish date: 2019-10-23

Actual Start Date: [text box] Actual Finish Date: [text box]

Duration: 1 Actual Duration: 0

Estimates

Estimated Finish Date: [text box] Estimated Start Date: [text box]

OK Cancel

Note: You may need to update the dependencies for the activities on each side of the new activity you added.

10. **Select** “OK” to save and create the new milestone.
11. **Click** “Save” before closing.
12. **Update** the schedule to reflect the most current information until baseline.

Action By: Project Team

Example

Note: **Baseline** the schedule at the point of schematic design approval. This will add dates to the Baseline Start and Baseline Finish dates that reflect the values in the Start date and Finish date columns.

Note: If you change dates, prior to baseline, need to select “Save” first before moving to the Edit step.

id	Start date	Finish date	Baseline Start	Baseline Finish
1	01/01/2009	01/01/2009		
2	01/02/2009	02/18/2009		
3	02/19/2009	02/19/2009		
4	02/20/2009	05/05/2009		
5	05/06/2009	07/13/2009		
6	07/14/2009	08/17/2009		
7	08/18/2009	10/19/2009		
8	10/20/2009	01/07/2010		

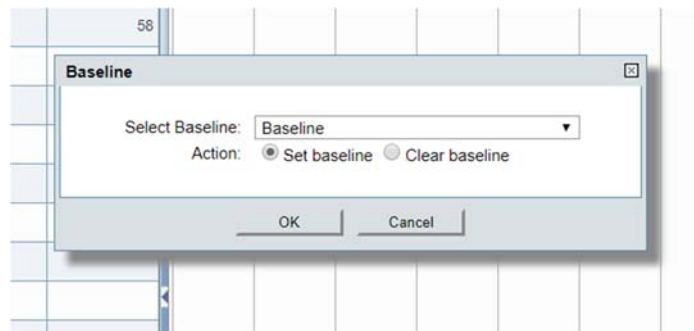
13. **Select** “Edit>Baseline” to open the baseline window.

14. In the baseline window, **select** “Baseline” from the select baseline pull down.

15. **Choose** “Set Baseline” as the action.

16. **Select** “OK”.

Note that the baseline start and end dates are now populated to reflect the Start Date and End Date values.

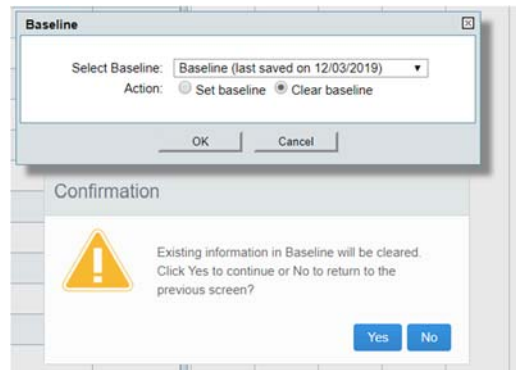


17. **Continue** updating the Start and End date values as the project progresses as the “forecast” date.

18. To clear a baseline, **select** “Clear Baseline” in the baseline window.

19. In the confirmation window, **select** “Yes”.

Note: If selecting Yes does not close the window. Select “Cancel” in the Baseline window and then select yes again.



20. As the project progresses, **open** the schedule to update the additional dates.

21. When milestones are complete, **update** the Start and End dates to reflect what actually happened.

END TASK

3.9 STAKEHOLDER MANAGEMENT

3.9.0 INTRODUCTION

Stakeholder management is the process of managing project access for anyone involved in your project. For our PDS system, it is how users are added, modified or removed from each project

NOTE:

The following groups will need to be managed on each project. All other groups are standard, and come pre-populated with the appropriate users

UCB Users:

All Project Users

Project Managers

Project Coordinators

Planners

Clients

Cx Authority

Non-UCB Users:

AEC

Contractor

Cx Authority

Vendor

3.9.1 ADDING OR UPDATING PDS USERS IN A PROJECT (UPDATED: 4/2/2020)

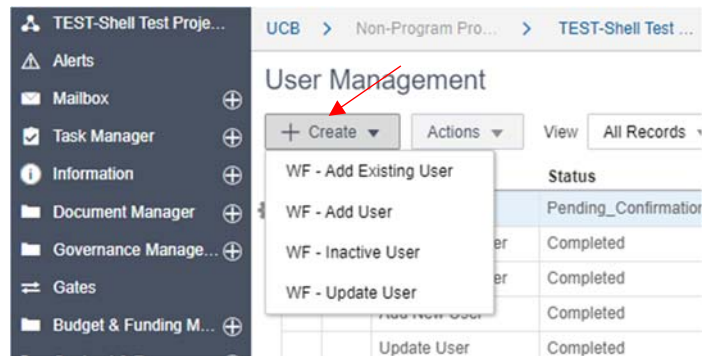
- Goals** How to add or updates users on a project.
- Navigation** Project>Stakeholder Management>User Management
- Action By** Project Coordinator
- Pre-requisites** Sponsor account initiated by PC using standard systems when adding new user.
- Related Files** 3.9.2 Removing PDS Users from a Project

Action By: Project Coordinator

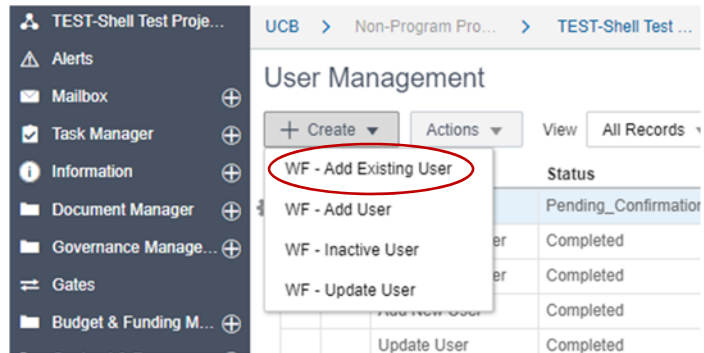
Example

1. **Navigate** to Project>Stakeholder Management>User Management.
2. **Select** “Create”. Note the following options. We will use “Add Existing User” for this help file.
 - a. **Add Existing User:** PC requests to have users currently in Unifier to be added to the project as needed. Use this Workflow if you think the user is already in the system.
 - b. **Add User:** If the user is new to Unifier, the PC will use this workflow to create a request to create the user after the sponsor account / identikey has been obtained. This will “add a license” and should be considered carefully.
 - c. **Update User:** If the PC has added the user to all the groups needed at the project level but has an issue with the user accessing a BP or workflow, they will use this workflow to request a change to permissions or workflow setup.

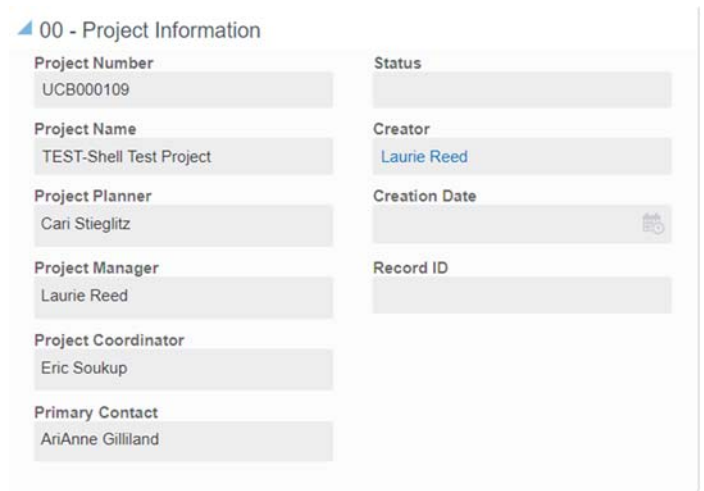
Note: If a user needs to be Inactivated or removed, please see 3.9.2 Removing PDS Users from a Project or Unifier.



3. **Select** the “Add Existing User” workflow.

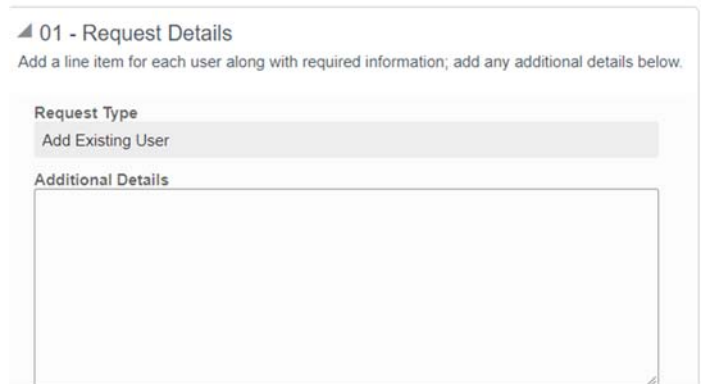


Under 00 - Project Information: **note** greyed fields will auto-populate



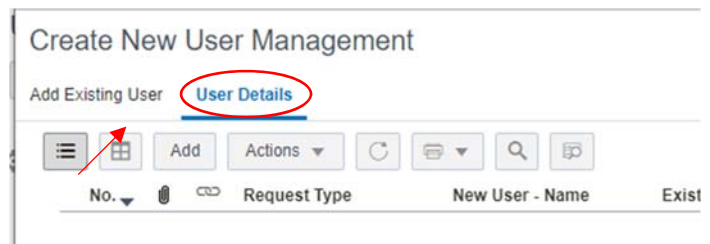
Under 01 – Request Details:

4. In the “Add User” workflow, **enter** data for Additional Details pertinent to the request, e.g. which groups / roles the user will have in the system.



5. **Select** “User Details” at the top of the screen.
6. **Select** “Add”.
 - a. If the User does not appear when searching in “Select User (if existing)” field under User Details, cancel the record and use “Add New User” Workflow.

Note: that grid view can also be used to enter multiple users at once. This is the “table” looking icon next to Add.



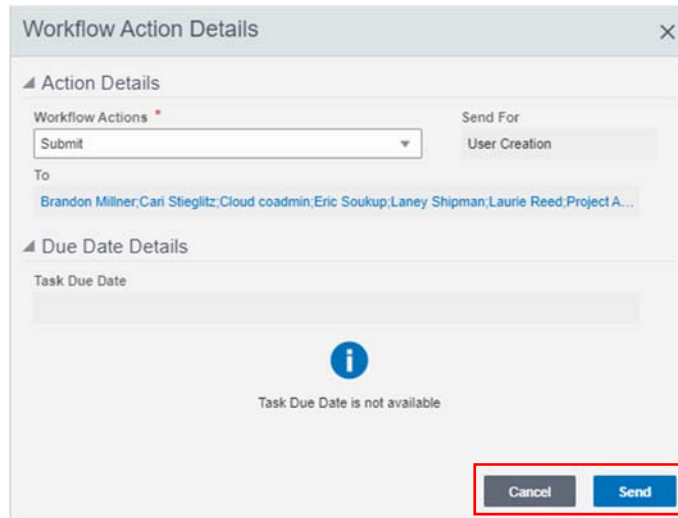
In 00 – Add User Details **enter** required information.

Note: If adding existing user, only “Select User (if existing)” will be an Active field. All other fields in 00 – Add User Details will be greyed out. If the User doesn’t appear in the list, cancel the record and use “Add User” Workflow.

7. **Select** “Save” at the bottom of the entry form to save the entry.
 - b. Alternately, **select** “Save & Add New” to save current entry and add another.
 - c. **Select** “Cancel” to cancel entry not yet saved.
8. **Select** “Send” at the top right to open the Workflow Actions.

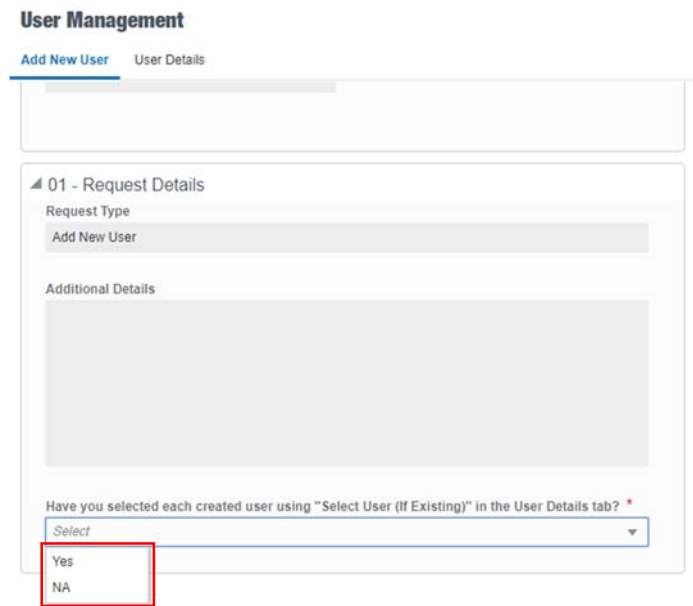
The screenshot shows a web application interface for adding user details. At the top right, there are buttons for 'Send', 'Save', and a menu icon. A red arrow points to the 'Send Save' button. Below this is a section titled 'Line Item Details' with a sub-section '00 - Add User Details'. This section contains a dropdown menu for 'Select User (if existing)' with a search icon and a text input field. Below this are several required fields: 'First Name', 'Last Name', 'Title', 'Phone', 'Email Address', 'Company', 'Identikey / Username', and 'Partner User'. At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Save & Add New'. A red box highlights these buttons. Below the '00 - Add User Details' section is another section titled '01 - Inactivate User Details' with a 'Select User' dropdown and an 'Identikey / Username' field.


9. Note in the Workflow Action Details screen, “Add Existing User”
 - d. In the “Add New User” Workflow, “Submit” is the only option in this step and is pre-selected.
10. **Select** “Send”.

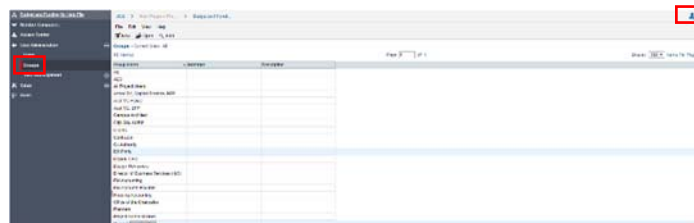


Note: this step is only for project administrators and used if the “Add New User” workflow was selected.

11. Project Administrator locates, opens and accepts the task.
12. A new required field in 01 – Request Details is activated in this step.
13. If more information is needed, the Project Administrator will return with comments added in the Comments tab.
14. If all information is complete the record will be sent for “Notify Requestor”

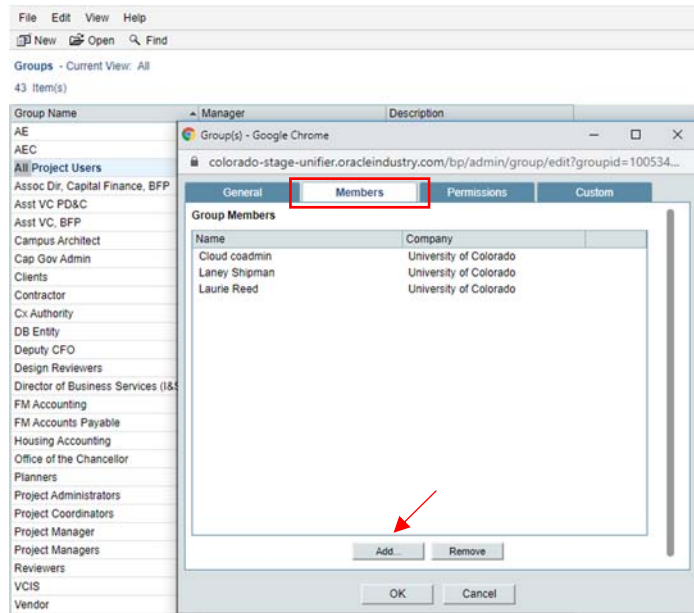


15. **Receive** task (Requestor / Project Coordinator) of next step and **navigate** to the project to start adding the user to a group.
16. **Select** the person with a tool icon to switch to Admin mode. 
17. **Navigate** to User Administration>Groups
18. **Double-click** on the Group you want to add to User(s) to.



19. Note a new window opens and shows all Users currently in the Group in the “Members” tab.

20. **Select “Add”**.



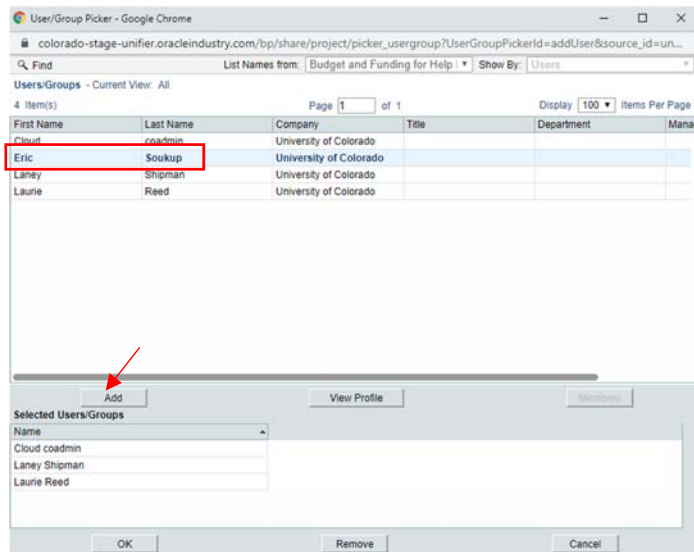
21. A new window opens. Current Project Users are shown in the top pane, Group Users are shown in the bottom pane.

22. **Highlight** the User(s) to be added to the Group in the top pane.

e. Optionally, hold down control and multi-select.

23. **Select “Add”**.

Note: In addition to the specific user group, each user will need to be added to the “All Project Users” group.

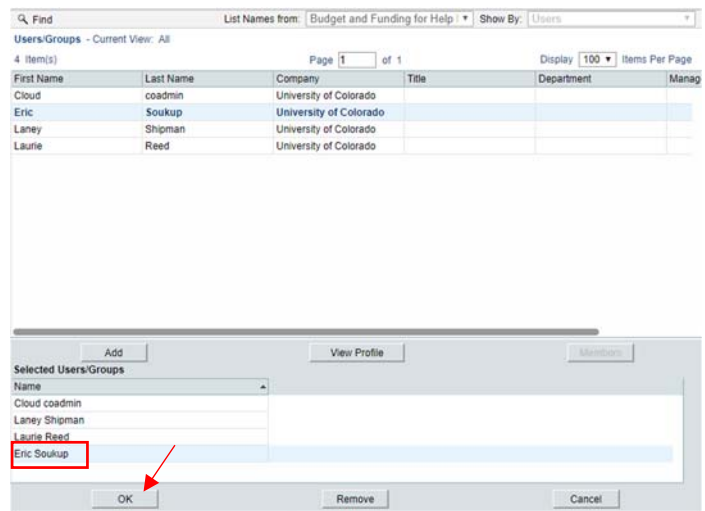


24. The selected User(s) is now in the bottom pane “Selected Users/Groups”.

25. **Select** “OK”.

Note: You can check to be sure the User(s) was added to the Group by opening the Group. The User will appear in the “Members” tab.

26. **Repeat** steps for each new Group/ User(s) added in this request.



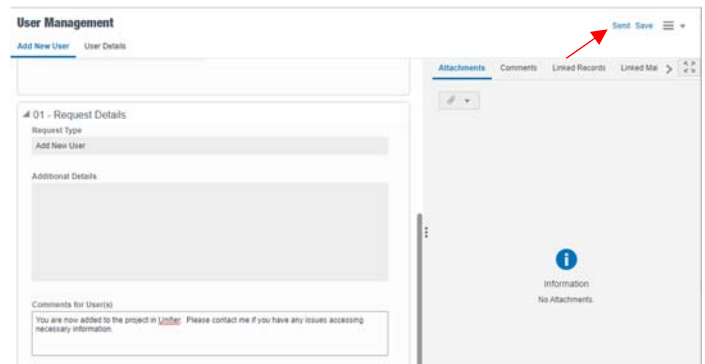
27. **Switch** back to User mode by clicking the icon .

28. **Locate, open and accept** the task.

29. A new field “Comments for User(s)” is now available. PC may enter any relevant information to the added User(s). This information will be included in a notification sent to the User(s).

30. **Review** all data for accuracy.

31. **Select** “Send”.



32. “Notify User” is the only option in this step. The User(s) is notified that they now have access to the project. Add the new User(s) to the CC field.

33. **Select** “Send”

f. This is a terminal step for the business process.

Workflow Action Details

▲ Action Details

Workflow Actions *
Notify User

Send For
End

CC
Start typing for suggestions...

Cancel Send

Project/Shell: Test From RA 7

You have been copied on User Management UM-00010.

From :	Laurie Reed
Sent For :	End

Source Name :	Test From RA 7
Record No :	User Management UM-00010
Title :	Add New User

Comments for User(s):	You are now added to the project in Unifier. Please contact me if you have any issues accessing necessary information.
-----------------------	--


END TASK

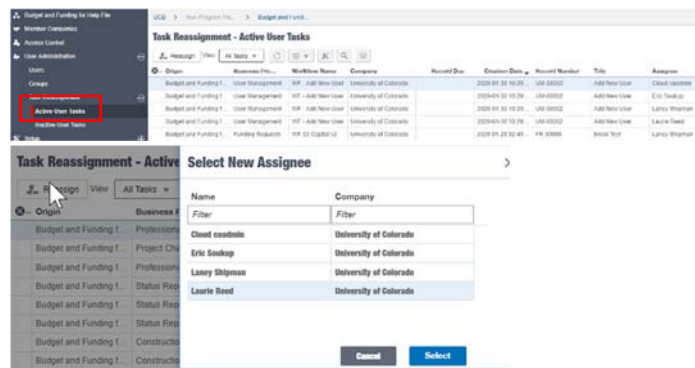
3.9.2 REMOVING PDS USERS FROM A PROJECT OR UNIFIER (UPDATED: 4/2/2020)


- Goals** How to remove users from a project and/or Unifier.
- Navigation** Project>Stakeholder Management>User Management
- Action By** Project Coordinator
- Pre-requisites** Notification of a user to be removed from the project.
- Related Files** 3.9.2 Removing PDS Users in Unifier

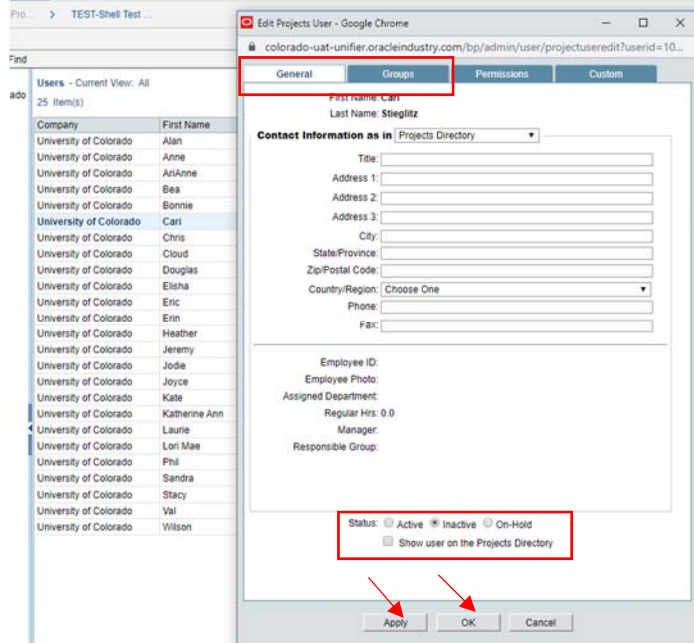
Action By: Project Coordinator

Example

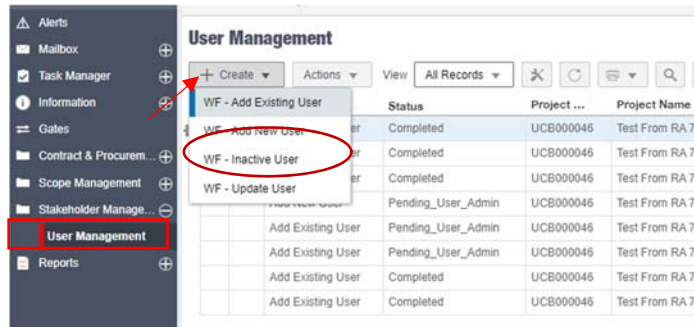
1. **Navigate** to the project.
2. **Select** the person with a tool icon to switch to Admin mode. 
3. **Navigate** to User Administration>Task Reassignment. First, confirm the user does not have any active workflows assigned to just them by accessing "Active User Tasks"
 - a. **Reassign** tasks if necessary.
 - b. Highlight task, **select** New Assignee, select "Select".
 - c. **Repeat** until all tasks are assigned to others.



4. **Navigate** to User Administration>Users
 5. Double click on the user that is to be inactivated.
 6. In the “General” tab, **select** “Inactive”, Uncheck “Show user on the Projects Directory”.
- Note: Currently Company Administrator can inactivate the User. A future upgrade will allow a PC to inactivate.
7. In the “Groups” tab, remove all groups. Highlight the groups and select “Remove” at the bottom of the screen.
 8. Select “Apply”, then “OK”.
 9. **Switch** back to User mode by clicking the icon .



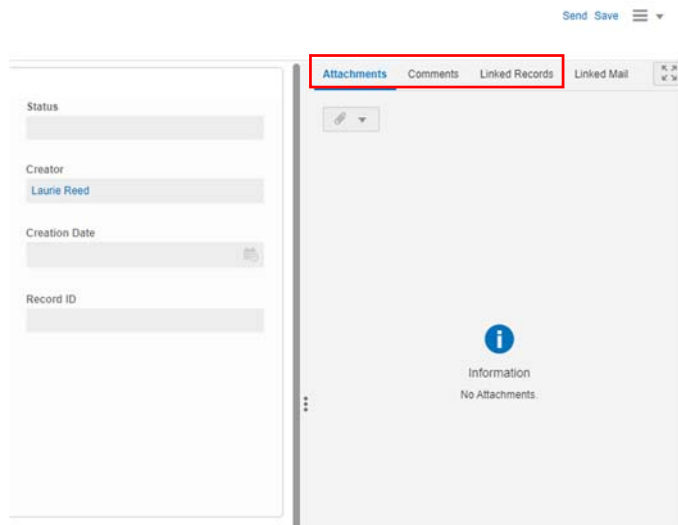
10. **Select** “Create”. Note the following options. We will use “Inactive User” Workflow for this help file.
11. **Select** the “Inactive User” workflow.



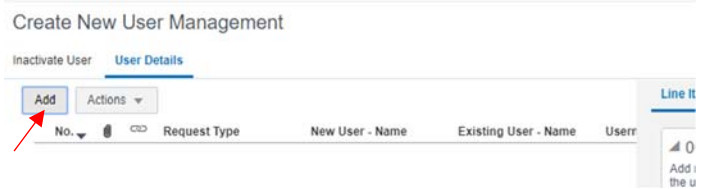
12. Under 00 - Project Information, **note** greyed fields will auto-populate

13. Under 01 – Request Details:

- a. **Enter** data for Additional Details pertinent to the request, e.g. which groups / roles
- b. Notes, Attachment, Comments, etc. may be added using the buttons indicated.



14. **Select** User Details and select “Add”.



15. In 01 – Inactivate User Details **select** the user you just deactivated.
16. **Enter** data for other red asterisked fields.
17. **Select** “Save” to save the entry.
 - a. Optionally, **select** “Save & Add New” to save current entry and add another.
 - b. **Select** “Cancel” to cancel entry not yet saved.

01 - Inactivate User Details

Select user inactivated and confirm that you have updated their status to "Inactive" in the project.

Select User *

Type a Name...

Identikey / Username

Title

Email Address

Company

User Left Company?

Select

User Inactivated in Project? *

Select

License Released?

Cancel Save Save & Add New

18. **Select** “Send” to open the Workflow Actions Detail screen.

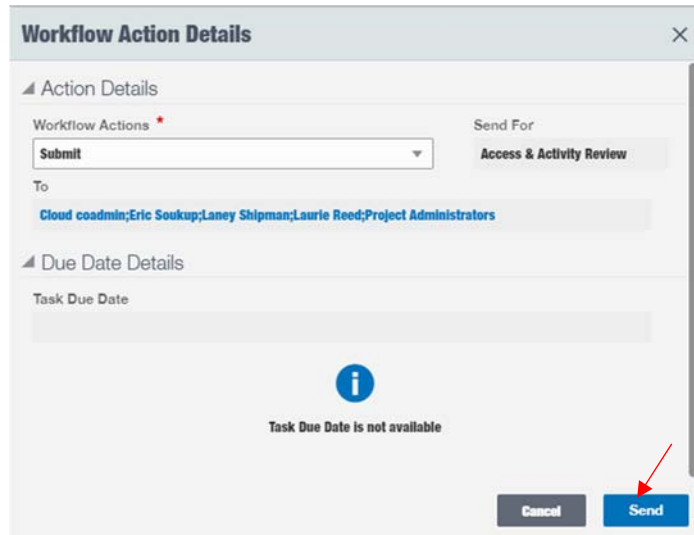
Send Save

Line Item Details

Userrr

19. Note in this step “Submit” is the only option and is pre-selected.

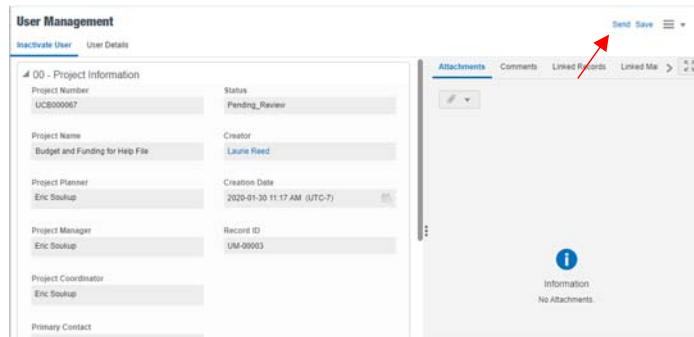
20. **Select** “Send”.



21. Company Administrator locates, opens and accepts the task.

22. All information is reviewed and deactivation at the Company level is performed if needed.

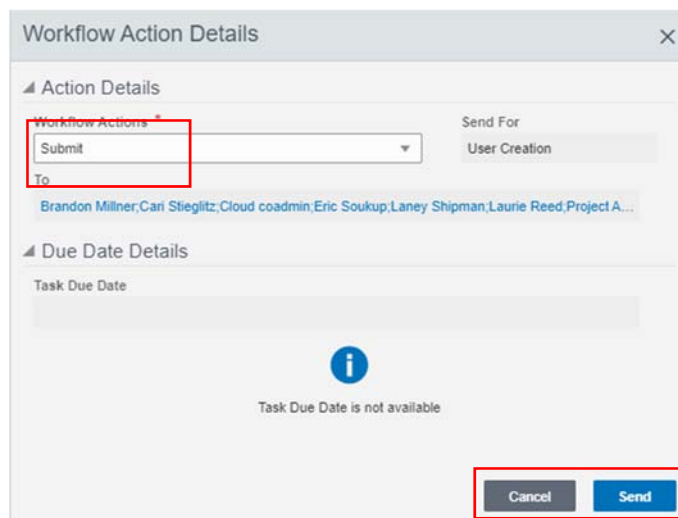
Note: Currently Company Administrator will deactivate the User in this step. A future upgrade will allow a PC to deactivate in the prior step.



23. **Select** “Send”.

24. **Note** in the Workflow Action Details screen, “Submit” is the only option in this step and is pre-selected.

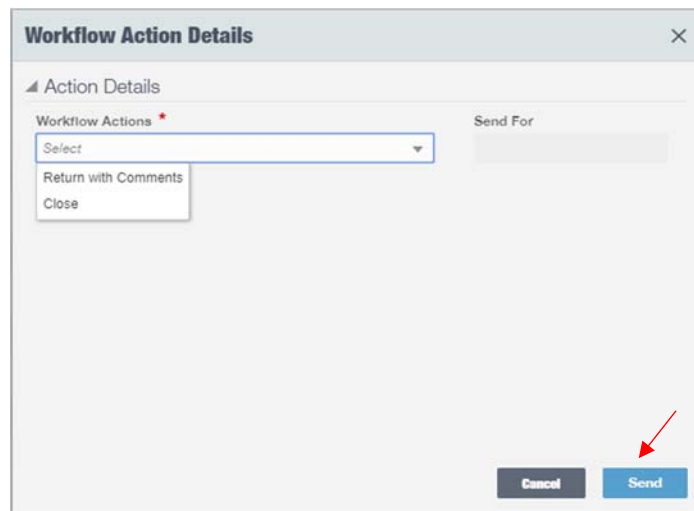
25. **Select** “Send”.



26. Selecting “Return with Comments” sends the record back to the Creator for “Clarification and Revision”.
27. Selecting “Close” is a terminal step for the record.
28. **Select** “Send”.

To reassign the project coordinator:

- Current PC verifies that all tasks assigned to themselves are completed or reassigned. If a task is to be reassigned, the new assignee must be added first.
- Current PC adds the new PC to the project using the “Add Existing User” Workflow.
- Current PC switches to Admin Mode and adds the new PC to the “Project Coordinator” and “All Project Users” groups.
- Current PC switches back to User Mode and completes the record in the User Management BP.
- New PC follows instructions above to inactivate the former PC.
- New PC updates Project Information.



END TASK

3.10 REPORTING AND DASHBOARDS

3.10.0 INTRODUCTION (UPDATED 3/19/2020)

Reports and dashboards are available in multiple locations in Unifier. This section covers the various types and how to interact with them, including:

- Dashboards – Unifier dashboards show a basic visual format that is updated in near-real time. Each project has a primary dashboard that helps project teams see their data quickly.
- User Defined Reports (UDRs) – UDRs are quick outputs of data to excel and don't include any branding, formatting or special layouts.
- Reports (Custom) – Custom Reports have special formatting or branding associated with them and combine data from multiple sources. Several Custom Reports are already included. New reports are by special request and will be reviewed by the Change Board as to applicability and possible implementation. There is a significant cost to create Custom Reports.
- Prints (Custom) – Custom Prints are forms or outputs to a single business process e.g. Professional Agreements formatted in a specific way. Note that not every business process has a custom print.

The following sections dive more into these different types of reports and how to use them. As always, permissions apply, so contact your Project Coordinator if you can't see something you think you should.

A full list of prints and reports is below:

Name	Navigation
Dashboard Report (Unifier)	Project Name> "... " >Project Dashboard
Quad Chart (in the Project Status as Draft)	Project Name>Reports>Quad Chart (in the Project Status as Draft)
Quad Chart (for Cap Gov meetings)	UCB>Reports>Quad Chart
SC-5.1 Architect/Engineer Agreement	Professional Agreement>Record>Print>Custom
SC-5.2 Architect/Engineer Agreement (CM/GC)	Professional Agreement>Record>Print>Custom
SC-5.3 Consultant Agreement	Professional Agreement>Record>Print>Custom
SBP-7.1 Professional Invoicing	Professional Invoicing>Record>Print>Custom
	Project Name>Reports>SC-5.1 DBB Amendment (6.0A to the 5.1)
	Project Name>Reports>SC-5.2 CMGC Amendment (6.0B to the 5.2)
	Project Name>Reports>SC-5.3 Consultant Amendment (6.0A to the 5.3)
SC-6.21 DBB Agreement	Construction Agreement>Record>Print>Custom
SC-6.4 CMGC Agreement	Construction Agreement>Record>Print>Custom
SC-8.0 DB-LS Agreement	Construction Agreement>Record>Print>Custom
SC-9.0 DB-GMP Agreement	Construction Agreement>Record>Print>Custom
SBP-7.2 Construction Invoicing	Project Name>Reports>SBP-7.2 Construction Invoicing
SBP-6.26 Notice to Proceed (DesignBidBuild)	Notice to Proceed>Record>Print>Custom

Name	Navigation
	Notice to Proceed>Record>Print>Custom
SBP-8.26 Notice to Proceed to Commence Design	Notice to Proceed>Record>Print>Custom
	Notice to Proceed>Record>Print>Custom
SC-6.311 Change Order Bulletin	Change Order Bulletin>Record>Print>Custom
	Change Order Proposal>Record>Print>Custom
	Project Name>Reports>SC-6.21 DBB Amendment (6.0A to the 6.21)
	Project Name>Reports>SC-6.4 CMGC Amendment (6.0B to the 6.4)
	Project Name>Reports>SC-9.0 DB-GMP Amendment (6.0B to the 9.0)
	Project Name>Reports>SC-8.0 DB-LS Amendment (6.0A to the 8.0)

3.10.1 VIEWING DASHBOARDS (UPDATED: 03/12/2020)

- Goals** How to view and interact with dashboards in Unifier.
- Navigation** Project>Home
- Action By** All Users
- Pre-requisites** Access to a project.
- Related Files** None

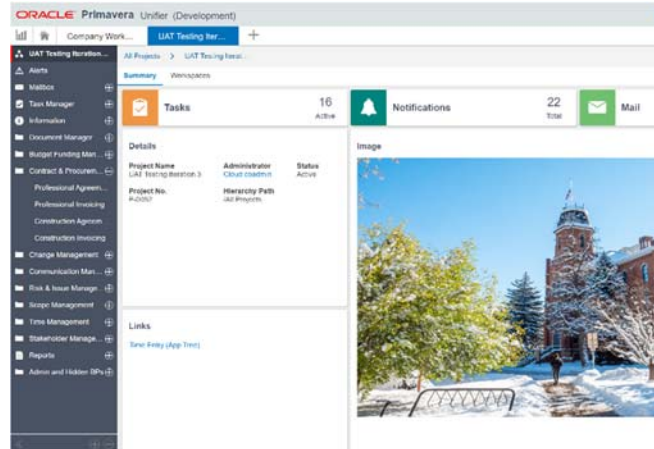
Action By: All Users

Example

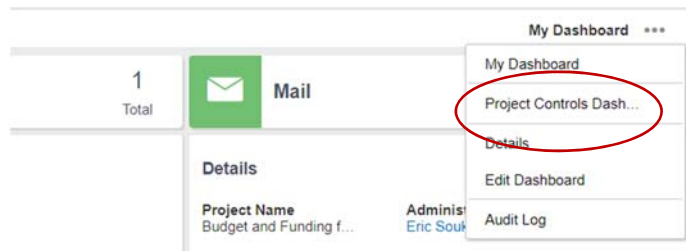
1. **Navigate** to Project Name- Home where Project Name is your project.
 - a. A dashboard will appear.
 2. By default, the summary dashboard will appear.
 3. Tasks, notifications and mail are listed along the top.
 4. The selected image for this project appears.

Note: To change the image contact your Project Coordinator.

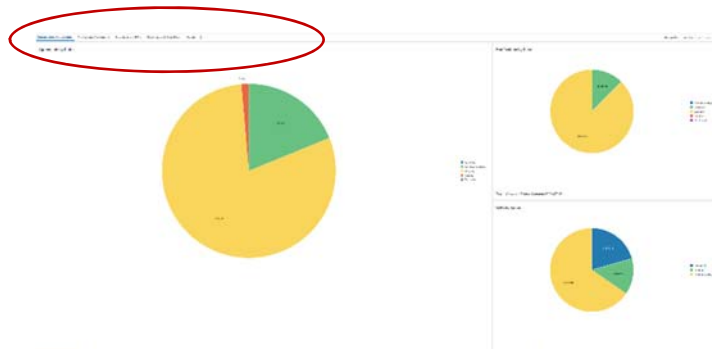
 5. Links, including a link to time entry is found in the lower left corner.



6. To toggle the view to available dashboards, **select** the “...” and select “Project Controls Dashboard” or another dashboard option from the list.
 - a. The Dashboard will open.



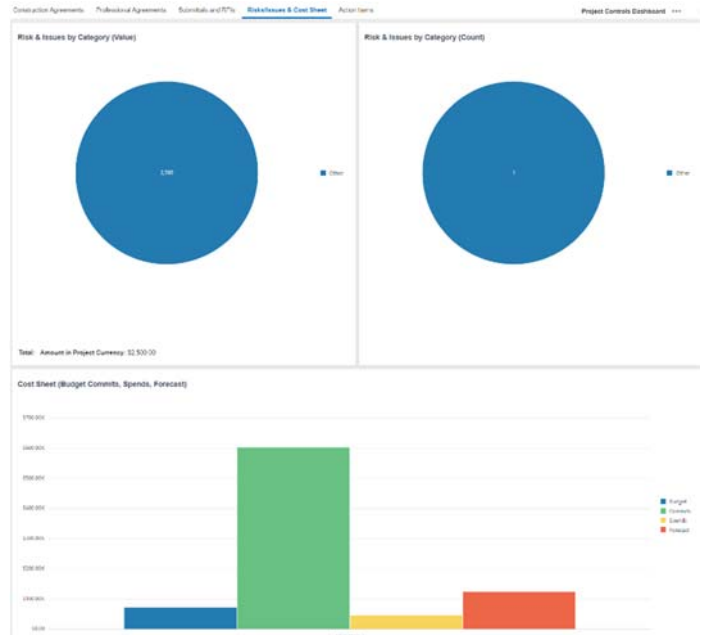
7. **Select** tabs along the top to navigate to sub-portlets.
 - a. Construction Agreements: Shows agreements, modifications and COPs by status.



Action By: All Users

Example

- b. Professional Agreements: Shows professional agreements and modifications by status, and modifications by vendor.
- c. Submittals and RFI's: Shows Submittal and RFI by status and submittals by number of revisions.
- d. Risks, Issues & Cost Sheet: Shows the Risks& Issues by category and count. Shows cost sheet summary of budget, commits, spends and forecasts.
- e. Action Items: Shows Action Items by status and assignee.



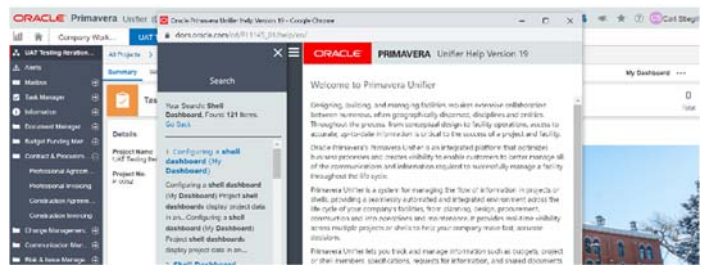
- 8. **Note** some reports can be “drilled down”. Click once on a graph to open the detail.

Note: The graphic to the right shows the drill down on the Action Item by Status.

The screenshot shows the 'Action Items' dashboard. On the left, a table titled 'Action Items by Status' lists items with their record numbers, titles, and assignees. On the right, a bar chart titled 'Action Items by Assignee' shows the count of items assigned to each person.

Record Number	Title	Assigned To
AI-00001	Light switch	Laurie Reed
AI-00002	Audio	Laune Reed
AI-00004	Carpet	Laurie Reed
AI-00005	Ceiling Tile	Laurie Reed
AI-00006	Wall Repair	Laurie Reed
AI-00007	Web Cam Not working	Laurie Reed
AI-00009	Contractor contact HazMat for abatement	Laurie Reed

Note: Dashboards can be configured with the right permissions. To learn how to configure the dashboard, select the “?” icon from the upper right section of the screen and select Unifier Help. Enter “Shell Dashboard” as the search criteria.



END TASK

3.10.2 VIEWING A USER DEFINED REPORT (UDR) (UPDATED: 10/24/2019)

Goals	How to pull and filter a UDR that has already been created.
Navigation	Project>Reports>User Defined Reports
Action By	All Users
Pre-requisites	Access to a project.
Related Files	None

Action By: All Users

Example

- Navigate** to Project>Reports>User Defined Reports and select the report you want to run. Note that as templates are refined, default reports will also appear in this list.

Note: UDRs can be created by those with permissions or pre-created.

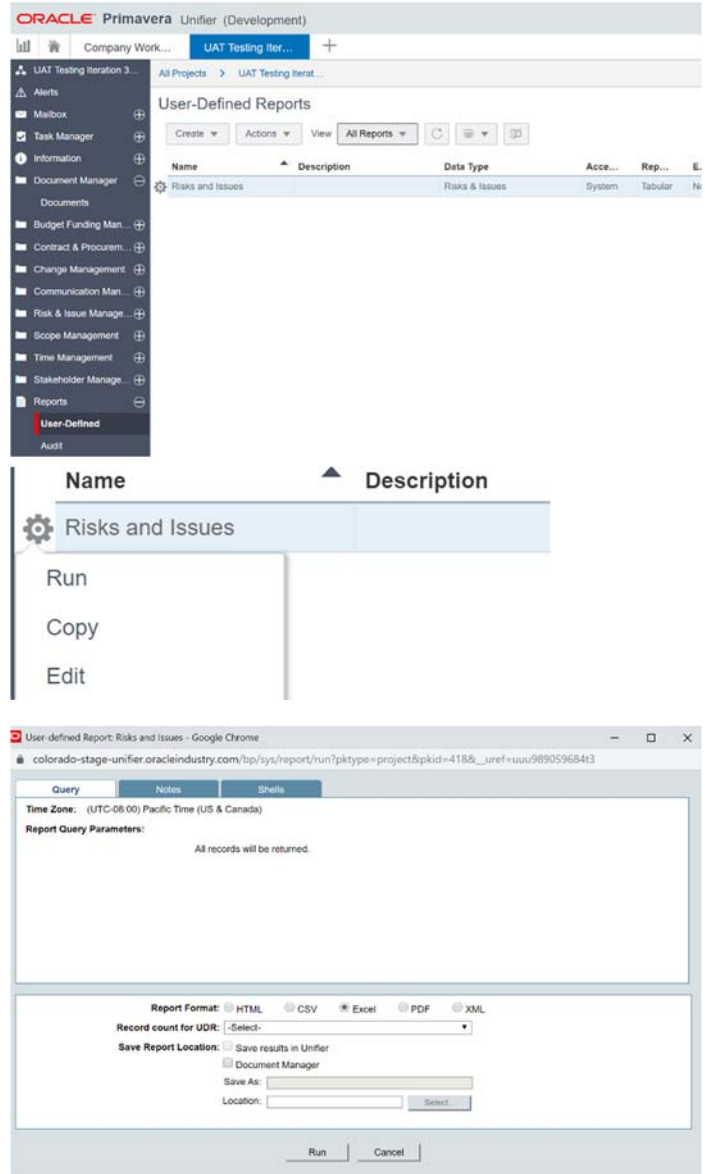
Note: If you have permissions, you can also copy or create UDRs. However, we recommend contacting the creator prior to modifying any existing UDRs.

- Double-select** the report or select the setting icon to open the report.
- Select** “Run” to run the report.
 - Copy and Edit will only be available if you have permissions.

- The UDR run screen will open.
- Select** “Excel” as the Report Format.
- Select** “Run” to generate the report.

Note: We recommend Excel as the output for UDRs.

- The report will download to the location of your default browser setting. It can be opened at this point and treated like a typical Excel document.



END TASK

3.10.3 PRINTING A REPORT, CUSTOM PRINT OR STATE FORM (UPDATED: 3/19/2020)

- Goals Learn how to pull a custom print directly from a business process record.
- Navigation Project>Business Process Name
- Action By All Users
- Pre-requisites Completed business process record.
- Related Files None

Action By: All Users

Example

1. Navigate to “Project Name>Professional Agreements and select a record of an already created agreement.

Note: Steps are the same for other processes, professional agreements is being used as an example.

State Contract	Vendor ID	Total C...	Contrac...	Effectiv...	Purcha...
SC-5.2	398475	2,000.00	1,000.00		
SC-5.2	398475	2,000.00	600.00	08/23/2019...	1234
SC-5.2	TESTCO	0.00	0.00		

2. With the record selected, **select** Actions>Print>Custom.
3. A pop up will appear.

State Contract	Vendor ID	Total C...	Contrac...	Effectiv...
SC-5.2	398475	2,000.00	1,000.00	
SC-5.2	398475	2,000.00	600.00	08/23/2019...
SC-5.2	TESTCO	0.00	0.00	

4. In the Print screen, **select** the following:
 - a. Custom Print Template: Select the desired output of the print.
 - b. Template: Use the default template set.
 - c. Format: PDF is recommended. However, other output options are available.
5. Select Print to generate the output.

Note: If your desired state form is not available in this list, it may be considered a Custom Report, which combines data sources from multiple processes or records. See the summary table in this section for where to navigate.

Print

Custom Print Template

Title

- SC-5.1 Architect/Engineer Agreement
- SC-5.2 Architect/Engineer Agreement (CM/GC)
- SC-5.3 Consultant Agreement

Template and Format

Template

SC-5.1 - Architect/Engineer Agreement - Design...

Format

PDF

Cancel Print

Action By: All Users

Example

- The output will generate and be available in the format you specified.

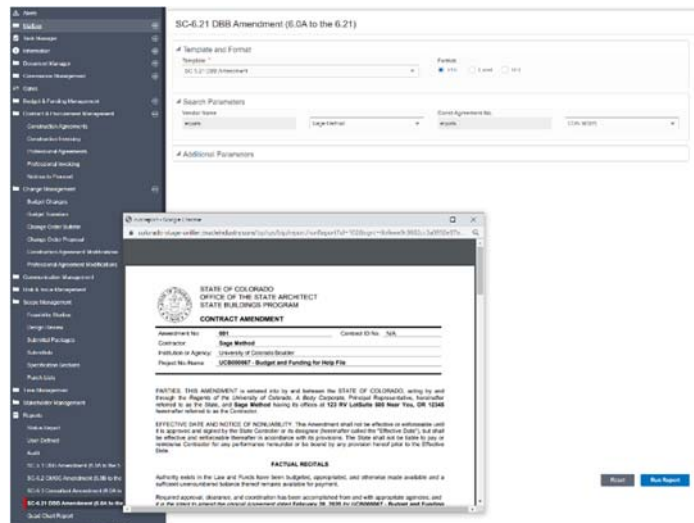
Note: Depending on your browser, it may show up directly in the output window or will download directly to the Downloads folder.

- To generate a custom report or state form that combines multiple data sources, complete the record as planned.
- Navigate** to Reports> and find the state form or report you are looking for.



- Ensure** PDF is the format.
- Select** the filters or parameters that are relevant to that report e.g. the Construction Agreement Number.
- Select** “Run Report”.
- View** report and save as needed.

Note: Depending on your browser, it may show up directly in the output window or will download directly to the Downloads folder.



END TASK

3.10.4 CREATING A USER DEFINED REPORT (UDR) (UPDATED: 10/24/2019)

- Goals** How to create and edit a UDR including permissions and schedule functionality.
- Navigation** Project>Reports>User Defined Reports
- Action By** All Users
- Pre-requisites** Access to a project.
- Related Files** None

Action By: All Users Example

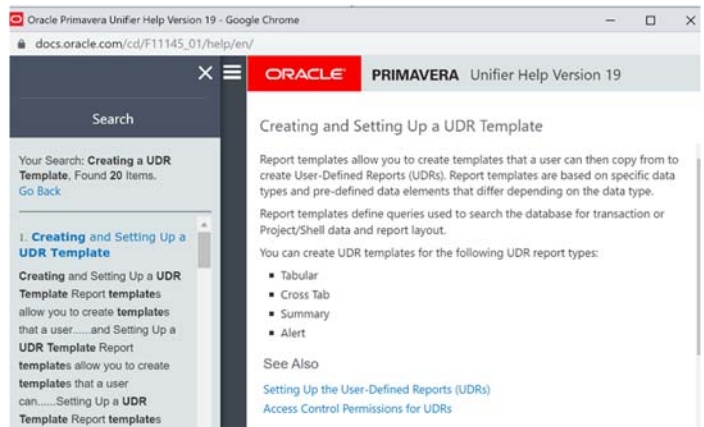
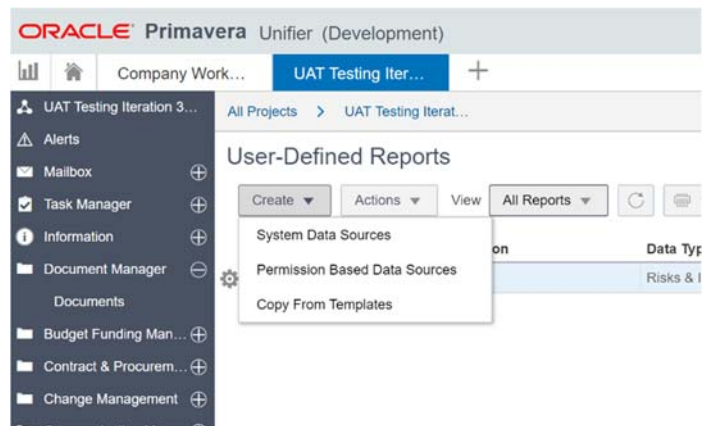
1. **Navigate** to Project>Reports>User Defined Reports.

Note: Editing a report modifies the report for all users.

2. Creating a new report allows for permissions to be set for users.
3. Copying a report is recommended if you do not own the original report.

Note: You must have permissions to edit or create UDRs to use this functionality. Contact your Project Coordinator for more information.

4. To learn specific functionality for UDRs, **select** the “?” icon and search for Creating a UDR Template.



END TASK

3.10.5 PREPARING PROJECT STATUS UPDATES (UPDATED: 2/20/2020)

Goals How to prepare project status updates for the capital governance or other portfolio / program level reporting.

Navigation Project>Reports>Status Report

Action By Project Team

Pre-requisites Receive notification of new status report or identify a need to create a new one. Status reports can be created at any time when major status changes, or in preparation for a Cap Gov review. Note the following scenarios:

- Monthly – From Status Report > Create
- Initiation – From Status Report > Create
- Feasibility – Auto-created from Feasibility Studies
- Programming – Auto-created from Programming
- Concept > Closeout – From Status Report > Create

Related Files 2.1.3 Completing Capital Governance Review

Action By: Project Team **Example**

1. **Navigate** to Project>Reports>Status Report.
2. **Select** “Create” if this is the first time the status report is being created.
 - a. If created from a “Promote Cap Gov Review” step from Feasibility Studies and/or Programming you can also access this via your task notification.
 - b. Optionally, copy an existing status report for updates.
3. In 00 – Project Information, **note** greyed out fields will auto-populate as appropriate.

Note: Notes, Attachments, Comments, etc. may be added using the buttons indicated to the right.

The screenshot displays the Oracle Primavera Unifier (Development) interface. At the top, there's a navigation bar with 'Company Work...', 'UCB', 'WLAW - Garde...', and 'UAT T'. Below this, a sidebar menu on the left lists various navigation options like Alerts, Mailbox, Task Manager, Information, Document Manager, Capital Governance, Status Report (highlighted), and Governance Manage... The main content area is titled 'Status Report' and features a '+ Create' button, 'Actions' dropdown, 'View' dropdown, and 'All Records' dropdown. A table below shows a list of status reports with columns for Type, Project No., and Project Name. The table contains several rows of 'Project Updates' for project 'P-0052' under 'UAT Testing It'. Below the table is a '00 - Project Information' form with the following fields:

Project Number	Status
P-0052	
Project Name	Creator
UAT Testing Iteration 3	Carl Stieglitz
Project Planner	Creation Date
Eric Soukup	
Project Manager	Record ID
Eric Soukup	
Project Coordinator	Project Phase
Eric Soukup	
Primary Contact	Capital Governance
Eric Soukup	CG-00001

Action By: Project Team

Example

4. In 01 – Item Details, **enter or edit** the Project Summary.

Note: This populates from Project Information.

5. In 02 – Project Status Details, **note** Planned, Projected, and Actual Amount will auto-populate from the same fields in “Budget” tab.

6. **Enter** color indicators for status. Options are Red, Yellow and Green.

Note: Status is set using the discretion of the Project Manager or Planner using the same standards they used in prior years for capital governance reviews.

7. **Select** “Questions / Recommendations” from the top tab list.

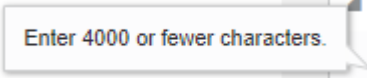
The screenshot shows a web application interface. The top section is titled "01 - Item Details" and contains a "Project Summary" section with a text input field labeled "Project Information Description". Below this is the "02 - Project Status Details" section, which includes several dropdown menus and input fields: "Budget Status" (dropdown with "Select"), "Planned Amount" (input field with "0.00"), "Projected Amount" (input field with "0.00"), "Actual Amount" (input field with "0.00"), "Schedule Status" (dropdown with "Select"), "Risks & Concerns Status" (dropdown with "Select"), and "Overall Project Status" (dropdown with "Select"). At the bottom of the screenshot, there is a "Create New Status Report" section with a horizontal tab list containing "Project Update", "Questions/Recommendations" (which is highlighted with a blue underline), "Status Summary", "Project Risks & Concerns", "Budget", and "Schedule".

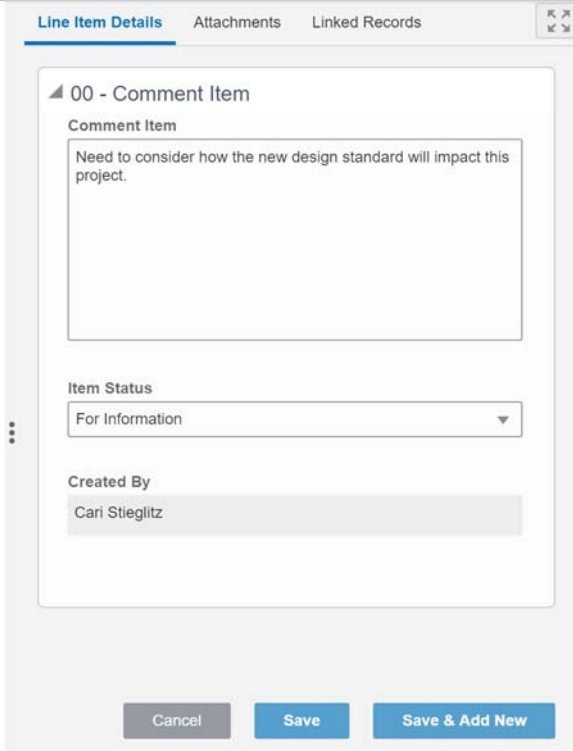
Action By: Project Team

Example

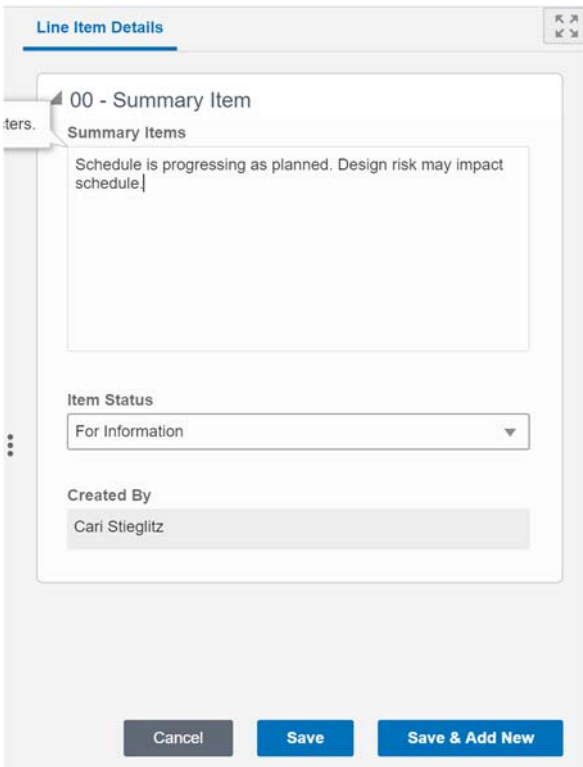
8. **Select** “Add”.
9. To the right of the form, in “Line Item Details”, **enter** a new item.

Note: Space on reports is limited so concise wording should be used.
Note, each text box includes limits of characters, and if you exceed the character limit an error will occur.


10. **Select** “For Report” if this comment should be displayed on reports.
11. Optionally, **select** “For Information” if this is information that will not be displayed but may help in preparation for Capital Governance processes.
12. **Select** “Save and Add New”.
13. **Add** additional 2-5 comments to populate the reports.
14. **Select** “Save” to finish Questions / Recommendations.
15. **Select** “Status Summary” from the top tab format.
16. **Select** “Add”.
17. To the right of the form, in “Line Item Details”, **enter** a new item.
18. **Select** “For Meeting / Report” if this comment should be displayed on reports.
 - b. Optionally, **select** “For Information” if this is information that will not be displayed but may help in preparation for Capital Governance processes.
19. **Select** “Save and Add New”.
20. **Add** additional 2-5 summary items to populate the reports.
21. **Select** “Save” to finish Summary Items.



The screenshot shows the 'Line Item Details' form for a 'Comment Item'. The form has three tabs: 'Line Item Details' (selected), 'Attachments', and 'Linked Records'. The main content area is titled '00 - Comment Item' and contains a text box with the text: 'Need to consider how the new design standard will impact this project.' Below the text box is an 'Item Status' dropdown menu set to 'For Information'. At the bottom, there is a 'Created By' field with the name 'Cari Stieglitz'. At the very bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Add New'.



The screenshot shows the 'Line Item Details' form for a 'Summary Item'. The form has three tabs: 'Line Item Details' (selected), 'Attachments', and 'Linked Records'. The main content area is titled '00 - Summary Item' and contains a text box with the text: 'Schedule is progressing as planned. Design risk may impact schedule.' Below the text box is an 'Item Status' dropdown menu set to 'For Information'. At the bottom, there is a 'Created By' field with the name 'Cari Stieglitz'. At the very bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Add New'.

Action By: Project Team

Example

22. **Move** to the next tab called Project Risks & Concerns.
23. To the right of the form, in “Line Item Details”, **select** “Add” to add a new item.
24. **Select** “For Report” if this comment should be displayed on reports.
 - c. Optionally, **select** “For Information” if this is information that will not be displayed but may help in preparation for Capital Governance processes.
25. **Select** “Save and Add New”.
26. **Add** additional 2-5 summary items to populate the reports.
27. **Select** “Save” to finish Risks & Concerns.

The screenshot shows a web form titled "Line Item Details" with a sub-header "00 - Risk / Concern". Below the sub-header is a section labeled "Risks & Concerns" with a large empty text area. Underneath is an "Item Status" dropdown menu currently set to "Select". A dropdown menu is open, showing three options: "Select", "For Report", and "For Information", with "For Information" highlighted. At the bottom of the form are three buttons: "Cancel", "Save", and "Save & Add New".

28. Move to the next tab called Budget.
29. **Select** “Add” for the Line Item Details to appear.
 - a. Budget Category is a pull-down field that contains Professional Services, Infrastructure and Site, Building Construction, Equipment and Furnishings, Miscellaneous, and Project Contingency.

The screenshot shows a web form titled "Line Item Details" with a sub-header "00 - Budget". Below the sub-header is a section labeled "Budget Category" with a dropdown menu set to "Select". Underneath are three input fields: "Planned Amount" (0.00), "Projected Amount" (0.00), and "Actual Amount" (0.00). At the bottom of the form are three buttons: "Cancel", "Save", and "Save & Add New".

30. **Enter** in full, known budget information.

Note: The sums of the line item amount will auto-populate in the upper form.
31. **Select** “Save”.
32. **Enter** in additional line items to represent the full budget.

Note: Planned, Projected and Actual use the same definition as currently used in the Quad Chart.

Action By: Project Team

Example

- 33. **Note** Schedule Milestone is a pull-down field that contains Programming Start, Design Start, BOR Approval, Construction Start, Occupancy, Substantial Completion, and Final Completion.
- 34. **Enter** milestones that should appear on reports.
 - a. The date fields are Date Only Pickers and will pull-down a calendar when the little icon to the right is selected.
- 35. **Select** "Save".
- 36. **Enter** additional milestones to reflect all milestones that should be reported at this point in the project.

- 37. **Preview** the Quad Chart as needed.
 - a. **Select** the "hamburger" (three line pull down) from the upper right corner of the window.
 - b. **Choose** Print – Custom.
 - c. **Select** the Quad Chart from the list and ensure PDF is the output.

00 - Project Information	
Project Number UCB000056	Status Approved
Project Name Capital Design/Build LungSum (DB LS)	Creator Katherine Ann Dunklau
Project Planner Wayne T Northcutt	Creation Date 01/09/2020 01:48 PM (UTC-7)
Project Manager Katherine Ann Dunklau	Record ID SR.0002
Project Coordinator Cynthia London	Project Phase 1 - Feasibility
Primary Contact	Capital Governance CG.0001

Action By: Project Team

Example

38. **Print** and **open** to validate the quad chart is displaying as intended.

Feasibility - UCR000056
Creation Date: January 29, 2020

Budget

	Plan	Proposed	Actual
Building Construction	\$1,000,000.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00
Professional Services	300,000.00	0.00	0.00
Project Contingency	300,000.00	0.00	0.00
Total	\$1,600,000.00	0.00	0.00

Schedule

	Plan	Proposed	Actual
Bill Approval	April 30, 2020	May 2, 2020	
Committee Start	January 1, 2021		
Design Start	April 10, 2020		
Final Completion	January 1, 2022		
Programming Start	February 16, 2020		

Risks & Concerns

Notes & Recommendations to Committee
None Approved - Moving forward with feasibility analysis.

BUILD **Boulder** Page 1 of 1 Planning Design & Construction

39. **Select** “Send” to open the Workflow Action Details screen.

40. **Select** “Send for Cap Gov Approval”.

- a. Optionally, **select** “Send for Updates” if you want another review and update prior to sending for Capital Governance review.

41. **Wait** for any revisions requested. Otherwise, task is complete.

Workflow Action Details

▲ Action Details

Workflow Actions *

Select

- Send for Updates
- Send for Cap Gov Approval

Send For

END TASK