



Project EVO Training – General Information for Requisitioners for Capital Projects



Why Project Evo?

- HRSD is implementing an integration of their ERP software, EBS, and their project management software, Unifier. The goal of this project is to leverage the strengths inherent in each of the systems.

What will NOT be affected

- Bid/Solicitation process – Still in Oracle E-Business Suite (EBS, ERP)
 - Including contract award
- Non-CIP project processes
- Non-cost related Unifier processes

What will NOT be affected

- iExpense (P-Card transactions)
- Payment (check) requests for non-PO invoices
- Receiving

What WILL Change – Project Management

- Initiation in Unifier:
 - ALL Requisitions for capital projects
 - ALL Change Orders for capital projects
 - Invoices against capital PO's

- Unifier: <https://uhrsd-primavera-idm.oracleindustry.com/>
- Contact Unifier Help Desk at UnifierAdmin@hrsd.com for Username and Password for Unifier
- Oracle E-Business Suite (EBS) or “ERP”: https://ebsprdap1.hrsd.com/OA_HTML/AppsLocalLogin.jsp

- May 5th – last day for initiation in EBS
- May 12th – last day to complete approvals in EBS
 - In-flight bids will be able to process in EBS
- May 18th – Cost records for capital projects initiated in Unifier
- Post go-live support: unifieradmin@hrsd.com



HRSD Contracts Business Process (BP)

- Used by Requestors to initiate Requisitions
- EBS Requisitions = Unifier's HRSD Contracts Business Process (BP).
- Flow of information:
 1. HRSD Contract BP created and approved
 2. Interface to EBS for Req creation
 3. Bid process and PO awarded in EBS
 4. Interface Final Contract Information back to Unifier

- Logging in to Unifier
- This is a unique username and password not related to ERP and will be assigned by the Unifier Admin - **unifieradmin@hrsd.com**



ORACLE[®]

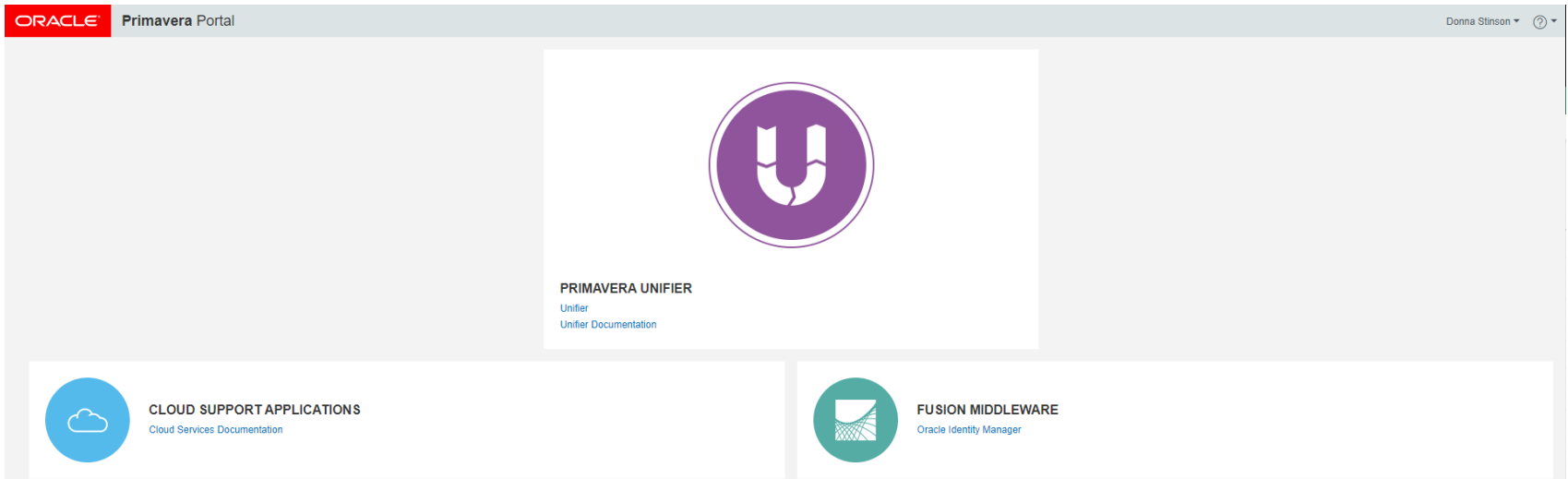
Construction
and
Engineering

Username

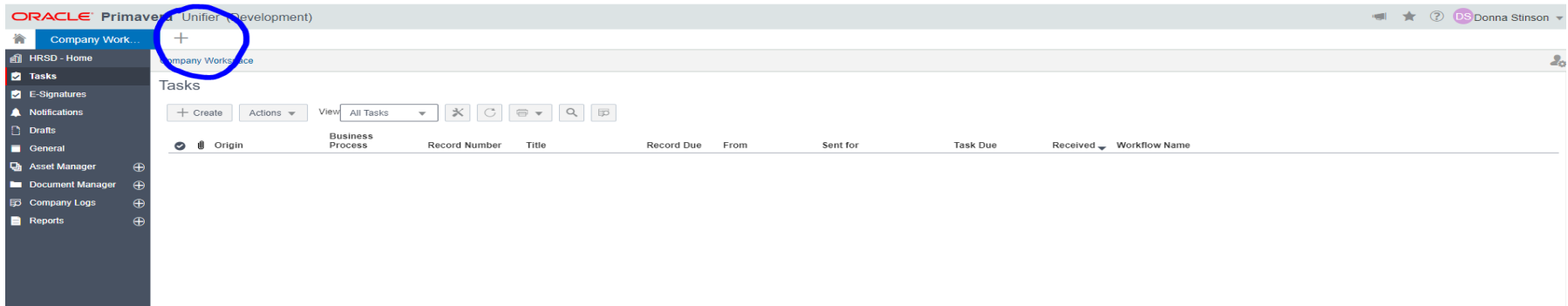
Password

[Sign In](#) [Forgot Password](#)

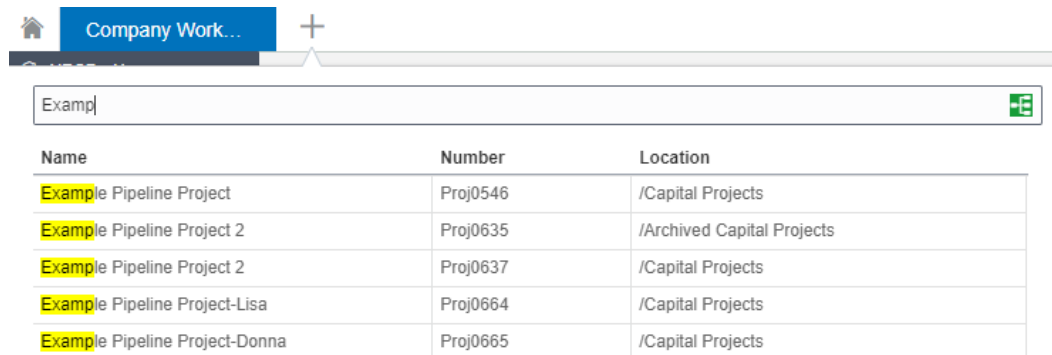
- Unifier Portal – Select the “U” to access Unifier



- Click the “+” to search your list of projects



- Begin typing the name of your project and the list will populate with your available projects. **Please note that the project number here is not the same as the ERP project number. It is a number unique to Unifier.**





Creating HRSD Requisitions

Navigation

- Expand the Contractual BP Logs by clicking the + sign.

The screenshot displays the Primavera Unifier web application interface. The browser address bar shows the URL: https://uhrsd-stage-unifier.oracle.com/bp/route/5/i--projectname?_uref=uuu701506355. The page title is "ORACLE Primavera Unifier (Development)". The navigation menu on the left includes items such as Alerts, Project Mailbox, Collaboration, Gates, Cost Manager, Budget BP, Document Manager, Schedule Manager, Payments BP Logs, Contractual BP Logs, Reports-Documental..., Transmittal-Delivera..., Project Management..., Contract Admin, Archived BP Logs, and Reports. The "Contractual BP Logs" item is highlighted with a red circle. The main content area shows a dashboard with sections for Tasks (1 Active), Notifications (2 Total), and Mail (0 Total). The "Details" section on the right displays project information: Project Name (Example Pipeline Proj...), Project Number (Proj0665), Administrator (HRSD Administrator), and Status (Active).

- Project > Contractual BP Logs > HRSD Contracts > Create

The screenshot displays the HRSD system interface. On the left is a dark sidebar with navigation items: Alerts, Project Mailbox, Collaboration, Gates, Cost Manager, Budget BP, Document Manager, Schedule Manager, Payments BP Logs, Contractual BP L..., HRSD Contracts.., HRSD Contract C..., Previous Contra..., and Field Orders. The 'Contractual BP L...' item is expanded, and 'HRSD Contracts..' is highlighted with a red box. The main content area shows a breadcrumb path 'Capital Projects > Example Pipeline...' with a red box around it. Below the breadcrumb is the title 'HRSD Contracts..' and a toolbar with buttons for '+ Create', 'Actions', 'View', 'All Records', and various utility icons. A table with columns 'Record Number', 'Contract Number', 'Requisition Number', 'PO Number', 'Title', 'Vendor Name', 'Amount', and 'Status' is visible. The first row contains the record 'HRC-000001' with a title 'Requisition for Engine...' and a vendor 'DESIGN ENGINEERIN...'.

Record Number	Contract Number	Requisition Number	PO Number	Title	Vendor Name	Amount	Status
HRC-000001				Requisition for Engine...	DESIGN ENGINEERIN...	\$2.00	Pe

Creating HRSD Contracts – Required Information

- Mandatory Fields = *

Create New HRSD Contracts..

General Cost Items

General

Title * Requisition for Engineer-PER and Design Agreement	Creator Stefanie Crowell
Record Number	Creation Date
Due Date	Status
<input type="checkbox"/> EBS Change Order	Account Number

Vendor Information

Vendor Name DESIGN ENGINEERING SERVICES PC	Worker's Comp Policy Number
Vendor Number 101397	WC Insurance Expiration Date 01/05/2019 03:00 AM (UTC-5)
General Liability Policy Number	Location Name Reference Scope of Work
GL Insurance Expiration Date	Ship-to Location 18622

Contract Information

Contract Number	Need by Date * 05/04/2020
Contract Type Select	Notice to Proceed Date MM/DD/YYYY HH:MM AM
Transaction Currency United States Dollar (USD)	Substantial Completion Days 0
Effective Date MM/DD/YYYY HH:MM AM	Substantial Completion Date
Contract Description (240) ?	Final Completion Days 0
StartDate MM/DD/YYYY HH:MM AM	Final Completion Date
	FinishDate MM/DD/YYYY HH:MM AM

Integrated EBS Fields

Contract / PO Type * Engineering	Agreement Number
Unifier Integration ID	PO Number
Requisition Number	PO Issued Date
Requisition Date	Requestor for EBS
Creator for EBS	Date Validation 7
Sent via Integration? No	



Adding Attachments

- Use the Attachments tab on the right-hand section of the General tab to upload documents

Create New HRSD Contracts..

General Cost Items

General

Title

Record Number

Due Date

EBS Change Order

Creator: Stefanie Crowell

Creation Date

Status

Account Number

Vendor Information

Vendor Name

Send Save

Attachments Comments Linked Records Linked Mail

Browse...
Document Manager...

Upload Files - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sys/dm/file/upload?file_type=bp&from_object_type=&from_object_id=&__uref=uuu859935...

Drag and drop or select files to upload

Browse...

File Name	File Size	Document Title	Rev. No.	Issue Date

Advanced Options

File Upload Options

Include reference files

Upload from My Computer

Revise automatically if file with same name exists

Cancel Upload

Creating HRSD Contracts – Cost Information Tips

Create New HRSD Contracts..

General **Cost Items**

Add Actions

No.	Line Number	EBS Task	Cost Code	Code Name	Short Des
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Send Save

Add Actions

No.	Line Number	EBS Task	Cost Code	Code Name	Short Description
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Transaction Details

Use quantity and unit cost for Goods contracts, or Dollar Amount for services. Integration will only create a services requisition if quantity is zero

Quantity

Used for services req's, not tied to quantity and unit price

Unit Cost

\$0.00

Dollar Amount

\$0.00

Total Contract Value

Amount

\$0.00

Cancel

Save

Save & Add New

Line Item Details

General

Replaces the old EBS Task which was a decimal value field

EBS Task

Select

Cost Code *

Type CBS Code or Name...

Code Name

Short Description *

This description will be sent to EBS, HOWEVER the field "Short Description" is critical in Unifier and is the only description for the line you will see when doing change orders or payments (invoices)

Line Item Description (240) *

Note to Buyer *

Line Number

0

Unit of Measure

Each

Transaction Details

Use quantity and unit cost for Goods contracts, or Dollar Amount for services. Integration will only create a services requisition if quantity is zero

Quantity

Cost Codes – Important!

- EBS Task – AKA project phase
 - Previously 10.01, 20.01, etc.
 - **Use WIP** unless purchasing land, or a project that will not result in a capitalizable asset (ex. studies)
 - WIP for Capitalizable projects
 - Non-WIP for Non-Capitalizable projects
 - Land for the purchase of land
 - Directs to the subset of expenditure types that can be selected

The screenshot displays the HRSD Contracts system interface. The main window is titled "HRSD Contracts.." and has tabs for "General", "Cost Items", and "Change Orders". The "Cost Items" tab is active. Below the tabs, there are buttons for "Add", "Actions", "View Currency", and "Transaction Currency". A table below shows a single line item with the following details:

No.	Line Number	EBS Task	Cost Code	Code
001	1	PrePlanning WIP	97120	PRE-F

To the right, a "Line Item Details" panel is open, showing a dropdown menu for "EBS Task" with "Design WIP" selected. A search dropdown is also visible, listing various options including "PrePlanning WIP", "PrePlanning Land", "PrePlanning Non-WIP", "PER WIP", "PER Land", "PER Non-WIP", and "Design WIP".

Cost Codes – Important!

- Cost Code – AKA Expenditure Type
- Must match with EBS Task
 - Check with the Project Manager if you are unsure of the task
 - Validations cannot be enforced by Unifier
 - Mismatches will be rejected by interface

General **Cost Items** Change Orders

View Currency Transaction Currency [v] [refresh] [print] [search] [help]

No.	Line Number	EBS Task	Cost Code	Code Name
002	2	Design WIP	92155	DESIGN A
001	1	PER WIP	91380	PER-PREI

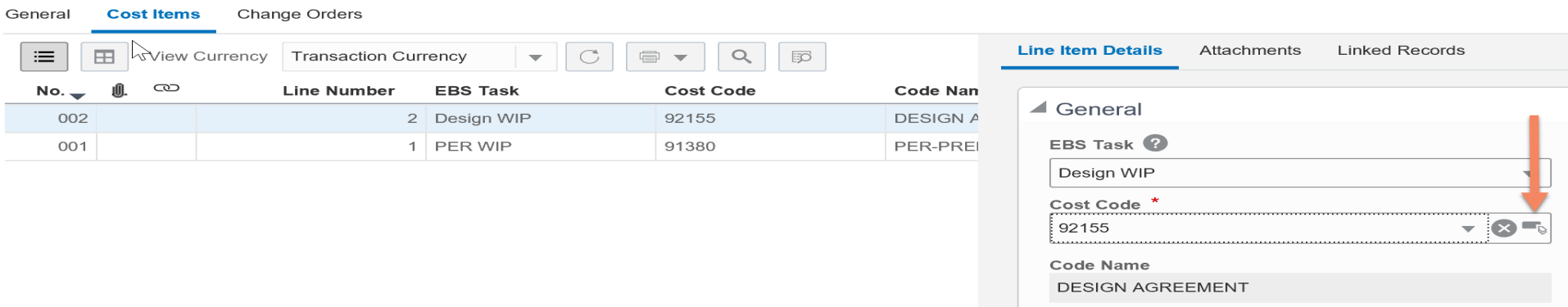
Line Item Details Attachments Linked Records

General

EBS Task ?
Design WIP

Cost Code *
92155

Code Name
DESIGN AGREEMENT





Cost Codes – Important!

- Cost Codes
- For example, if Design WIP is selected as EBS Task, a cost code in the design section must be used:

WBS Code	WBS Item
▶ 10.91000	PRE-SPANNING
▶ 20.91300	PRELIM ENGINEERIN...
▲ 30.92100	DESIGN SERVICES
92440	DESIGN SOFTWARE ...
97100	DESIGN ADVERTISING
97110	DESIGN CAPITALIZED...
97120	DESIGN MISCELLANE...
97130	DESIGN LEGAL
97140	DESIGN PARTNERING
92105	DESIGN - BUDGET
92110	DESIGN-PROGRAM M...
92155	DESIGN AGREEMENT
92125	DESIGN ENVIRONME...
92160	DESIGN BUILD
92170	DESIGN - LOCALITY R...
92175	DESIGN ENVIR DOC



- Determines the type of contract

▲ Transaction Details

Use quantity and unit cost for Goods contracts, or Dollar Amount for services. Integration will only create a services requisition if quantity is zero

Quantity	<input type="text" value="0"/>	
Unit Cost	<input type="text" value="\$0.00"/>	Dollar Amount ?
		<input type="text" value="\$0.00"/>

▲ Total Contract Value

Amount	<input type="text" value="\$0.00"/>
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Send for Approval, Send to Interface

- Requisition send for approval to Project Manager:

This screenshot shows the 'Workflow Action Details' dialog box for a 'Send for PM Review' action. The 'Workflow Actions' dropdown is set to 'Send for PM Review', and the 'Send For' field is set to 'PM Review'. The 'To' field lists 'HRSD Administrator;Stefanie Crowell;Project Managers'. The 'Task Due Date' field is empty, with a message below it stating 'Task Due Date is not available'. The background shows a 'Create New HRSD Contract' form with fields for Title, Record Number, Due Date, Amount, and Start Date. A 'Send' button is highlighted in the top right corner.

- Chief send to interface:

This screenshot shows the 'Workflow Action Details' dialog box for an 'Approve' action. The 'Workflow Actions' dropdown is set to 'Approve', and the 'Send For' field is set to 'I01 Int Hold (Req)'. The 'To' field lists 'Enstoa HRSD;HRSD Administrator;Lisa Matthews;Stefanie Crowell;Project Administrators'. The 'Task Due Date' field is empty. The background shows the 'HRSD Contracts' form with fields for Title, Record Number, and Due Date. A 'Send' button is highlighted in the top right corner.

Checking Requisition and Workflow Progress

- General > Integrated EBS Fields
 - Requisition Number and Requisition Date fields will update via EBS Integration
- General > Workflow Progress
 - Record will move to the Integration Hold step to wait for PO information

HRSD Contracts..

General Cost Items Change Orders

Integrated EBS Fields

Contract / PO Type Engineering	Agreement Number
Unifier Integration ID 84127939	PO Number
Requisition Number 3202728	PO Issued Date
Requisition Date 04/28/2020	Requestor for EBS Stefanie Crowell
Creator for EBS	
Sent via Integration? Yes	

Workflow Progress

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Stefanie Crowell	HRSD	Completed	Send for PM Revi...	04/27/2020 06:41 f
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	04/27/2020 06:46 f
I01 Int Hold (Req)	HRSD Administrator	HRSD	Completed	Req Complete	04/28/2020 10:22 /
I02 Int Hold (PO)	HRSD Administrator	HRSD	In Progress		

Checking Purchase Order and Workflow Progress

- General > Integrated EBS Fields
 - Awarded Vendor, PO Number and PO Issued Date fields will update via EBS Integration
- General > Workflow Progress
 - Record moved to Finalize Attachments when complete

The screenshot displays the HRSD system interface. On the left, the 'Integrated EBS Fields' section shows the PO Number as 6202077 and the PO Issued Date as 04/30/2020. On the right, the 'Workflow Progress' section shows a table of steps, with the '102 Int Hold (PO)' step highlighted in red, indicating it is the current step.

Step Name	Assignee	Company	Status	Action
Creation (PM)	Stefanie Crowell	HRSD	Completed	Send for Chief R
Chief Review	Stefanie Crowell	HRSD	Completed	Approve
I01 Int Hold (Req)	HRSD Administrator	HRSD	Completed	Req Complete
I02 Int Hold (PO)	HRSD Administrator	HRSD	Completed	PO Complete
Finalize Attachme...	Katie Markle	HRSD	Not Started	
Finalize Attachme...	Stefanie Crowell	HRSD	Not Started	
Finalize Attachme...	Enstoa HRSD	HRSD	Not Started	
Finalize Attachme...	Amy Murphy	HRSD	Not Started	

Finalize Attachments

- Contract Specialist or Procurement Specialist task
 - Upload final copies of attachments
 - Send for Vendor/Supplier Notification

The screenshot displays the HRSD Contracts interface. On the left, the 'General' tab is active, showing details for 'Requisition for Engineering Services' with record number 'HRC-000004'. A 'Workflow Action Details' dialog box is open, showing 'Send For Engineer Notification' as the selected action, sent to 'Willy Wonka'. The dialog also indicates that the 'Task Due Date is not available'. On the right, the 'Attachments' tab is active, showing a table of 'Unpublished Attachments' with two entries: 'Professional Service Agr...' and 'Scope of Work.pdf'. A 'Send' button is highlighted in the top right corner of the main interface.

Name	Title	Pub. No.
Professional Service Agr...		
Scope of Work.pdf		

- Vendor notified for either:
 - Professional Services Agreement OR
 - Contractor award
- Workflows
 - Accept and Close-record reaches Approved status
 - Vendor Notification-notifies Vendor of award

The screenshot shows the 'Workflow Action Details' window for a contract. The 'Workflow Actions' dropdown menu is open, showing options: 'Select', 'Send for Contractor Notification', and 'Accept and Close'. The 'Send For' field is empty. The 'Workflow Progress' section shows a table of steps with the following data:

Step Name	Assignee	Company	Status
Creation (PM)	Stefanie Crowell	HRSD	Completed
Chief Review	Stefanie Crowell	HRSD	Completed
I01 Int Hold (Req)	HRSD Administrator	HRSD	Completed
I02 Int Hold (PO)	HRSD Administrator	HRSD	Completed
Finalize Attachme...	Stefanie Crowell	HRSD	Completed
Engineer Notificat...	Willy Wonka	HRSD	In Progress



HRSD Contracts – Change Orders

- Change Orders can be viewed from within the corresponding HRSD Contract record

HRSD Contracts..

General Cost Items **Change Orders**

General

Title: Requisition for Engineering Services
Record Number: HRC-000004
Due Date: [blank]

Creator: Stefanie Crowell
Creation Date: 04/30/2020 07:58 AM (UTC-5)
Status: [blank]

Attachments | Comments | Linked Records | Linked Mail | W >

Unpublished Attachments

- Professional Service Agr...
- Scope of Work.pdf

HRSD Contracts..

General Cost Items **Change Orders**

EBS Change Order

+ Create [refresh] [print] [search] [help]

Record Number	Title	Vendor Name	Contract Number	PO Number	Amount	Status	Creator
HCO-000001	Amendment 1	AECOM TECHNICAL SERVICE...		6202077	\$250,000.00	Approved_Planned	Stefanie Crowell

Schedule of Values – SOV

- Unifier SOV tracks Contracts, Change Orders, and Invoice totals per contract record

HRSD Contracts..

General Cost Items Change Orders

General

Title: Requisition for Engineering Services
 Creator: Stefanie Crowell

Record Number: HRC-000004
 Creation Date: 04/30/2020 07:58 AM (UTC-5)

Attachments | Comments | Linked Records

Unpublished Attachments

- Professional Service Agr...
- Scope of Work.pdf

Cash Flow

SOV

CC more users...

Email as Attachment

Print

Review

Schedule of Values- (Base Record: HRC-000004) - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30362&_uref=uuu937952553t3

File Edit View

Export Import Rows Split Freeze Fund Assignment

Schedule of Values Currency: United States Dollar (USD)

Item #	Ref	Description		Original Contract Value	Pending Changes	Planned Changes	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments
0010	1	Requesting PER and Design Services	91380	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$0.00
0020	2	DESIGN AGREEMENT	92155	\$0.00	\$0.00	\$250,000.00	\$0.00	\$0.00	\$250,000.00	\$0.00

Schedule of Values- (Base Record: HRC-000004) - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30362&_uref=uuu937952553t3

File Edit View

Export Import Rows Split Freeze Fund Assignment

Schedule of Values Currency: United States Dollar (USD)

Item #	Ref	Description	WBS Code	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments	Paid to Date	Remaining Balance
0010	1	Requesting PER and Design Services	91380	\$0.00	\$0.00	\$15,000.00	\$0.00	\$0.00	\$15,000.00
0020	2	DESIGN AGREEMENT	92155	\$0.00	\$0.00	\$250,000.00	\$0.00	\$0.00	\$250,000.00





Creating HRSD Change Orders

- Project > Contractual BP Logs > HRSD Contract Change > Create

The screenshot displays the HRSD system interface. On the left is a dark sidebar with a list of navigation items: Alerts, Project Mailbox, Collaboration, Gates, Cost Manager, Budget BP, Document Manager, Schedule Manager, Payments BP Logs, Contractual BP Logs, HRSD Contracts.., HRSD Contract Change.., and Previous Contracts Versions. The 'HRSD Contract Change..' item is highlighted with a red box. The main content area shows a breadcrumb trail: 'Capital Projects > Example Pipeline...'. Below this is the title 'HRSD Contract Change..' and a toolbar containing a '+ Create' button (highlighted with a red box), an 'Actions' dropdown, a 'View' dropdown set to 'All Records', and several utility icons (delete, refresh, print, search, help). Below the toolbar is a table header with columns: Record Number, Title, Vendor Name, Contract Number, PO Number, Amount, and Status.

Creating HRSD Contract Change – Required Information

Create New HRSD Contract Change..

General Cost Items

General

Title *

Record Number

Due Date

Amount \$0.00

StartDate

Creator **Stefanie Crowell**

Creation Date

Status

Account Number

FinishDate

Need by Date

Base Contract Information

Reference Commit *

PO Number

Contract / PO Type ?

Original Contract Amount \$0.00

Previous Approved Changes \$0.00

Contract Number

Agreement Number ?

Amount This Change \$0.00

Revised Contract Amount \$0.00

Integration Information

Sent via Integration?

Vendor Information

Vendor Name ?

Vendor Number

Justification

Contract Type

Planned or Unplanned? * ?

Change Category

Has the corresponding risk item been resolved? ?

Reason for Change

Analysis of Reconn

Justification

Contract Type

Planned or Unplanned? * ?

Change Category *

Scope Change

Errors and Omissions

Unforeseen Conditions

Other

Has the corresponding risk item been resolved? ?

HRSD Contracts..

Search | Find on Page

Project Number	Record Number	PO Number	Vendor Name	Title	Status
Proj0640	HRC-000076	6202062	HAZEN AND SAWYER ...	SIT 05 REQ 02	Approved
Proj0640	HRC-000075	6202061	HAZEN AND SAWYER ...	SIT 05 REQ 01	Approved
Proj0640	HRC-000074	6202060	HAZEN AND SAWYER ...	SIT 04 REQ 06	Approved
Proj0640	HRC-000071	6202054	BROWN AND CALDW...	SIT 04 REQ 03	Approved
Proj0640	HRC-000070	6202053	BROWN AND CALDW...	SIT 04 REQ 02	Approved
Proj0640	HRC-000068	6202050	ABA MORIAH CORPO...	Retainage Test 04	Approved
Proj0640	HRC-000066	6202047	BROWN AND CALDW...	SIT 03 Req 03	Approved
Proj0640	HRC-000064	6202046	American Contracting &...	SIT 03 Req 01	Approved
Proj0640	HRC-000063	6202044	A.B.I.A.WELLAND SEP...	SIT Qty Retainage	Approved
Proj0640	HRC-000062	6202043	American Contracting &...	SIT BUDGET CHECK	Approved
Proj0640	HRC-000059	6202042	A H HARRIS AND SON...	SIT 02 Req 11 - proc qty	Approved
Proj0640	HRC-000055	6202041	CH2M HILL ENGINEE...	SIT 02 Req 06	Approved
Proj0640	HRC-000050	6202038	CH2M HILL ENGINEE...	SIT 02 Req 01	Approved
Proj0640	HRC-000048	6202037	American Contracting &...	SIT 01 Req 03	Approved
Proj0640	HRC-000047	6202036	CH2M HILL ENGINEE...	SIT 01 Req 02	Approved
Proj0640	HRC-000046	6202035	CH2M HILL ENGINEE...	SIT 01 Req 01	Approved
Proj0640	HRC-000041	6202030	ACHIEVE 1 LLC	YF - PW Eng Lump Su...	Approved
Total: 39					

Cancel Select



Creating HRSD Contract Change – Base Contract Information

- Fields filled from original HRSD Contract BP
- Contract/PO Type – determines record workflow

HRSD Contract Change..

General Cost Items

Base Contract Information

Reference Commit: HRC-000012

PO Number: 6201510

Contract / PO Type: Procurement

Contract Number: [Redacted]

Agreement Number: [Redacted]

Original Contract Amount: \$200,000.00

Amount This Change: \$100.00

Previous Approved Changes: \$0.00

Revised Contract Amount: \$200,100.00

Workflow Progress

Title: co 2 on this project

Record Number: HCO-000004

Current Step: End

BP Setup Used: PM Enters (Integration) V1

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Enstoa HRSD	HRSD	Completed	Approve	05/01/2020 04:31 PM (UTC-5)
Procurement Assignment	Enstoa HRSD	HRSD	Completed	Assign Specialist	05/01/2020 04:31 PM (UTC-5)
Procurement Specialist	Enstoa HRSD	HRSD	Completed	Send for Integration	05/01/2020 04:31 PM (UTC-5)
I01 Int Hold (PO)	HRSD Administrator	HRSD	Completed	Approved	05/01/2020 04:38 PM (UTC-5)

Base Contract Information

Reference Commit: HRC-000014

PO Number: 6201511

Contract / PO Type: Engineering

Contract Number: [Redacted]

Agreement Number: [Redacted]

Original Contract Amount: \$1,525.30

Amount This Change: \$669.54

Previous Approved Changes: \$0.00

Revised Contract Amount: \$2,194.84

Workflow Progress

Title: CO for PO 6201511

Record Number: HCO-000005

Current Step: End

BP Setup Used: PM Enters (Integration) V1

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Donna Stinson	HRSD	Completed	Approve	05/02/2020 09:28 AM (UTC-5)
Contract Specialist (Eng)	Donna Stinson	HRSD	Completed	Send for Integration	05/02/2020 10:33 AM (UTC-5)
I01 Int Hold (PO)	HRSD Administrator	HRSD	Completed	Approved	05/04/2020 12:41 PM (UTC-5)

Creating HRSD Contract Change – General Tooltips

Justification

Contract Type
Select This determines where the change will show on the cost sheet

Planned or Unplanned? ?
Select

Change Category
Select Verify that any risk items associated with this change order have been closed out.

Has the corresponding risk item been resolved? ?
Select

Reason for Change

Base Contract Information

Reference Commit *
Type a Record Number... Contractor Record?

PO Number Used to determine which workflow path this record will follow

Contract / PO Type ?

Agreement Number ? Used to reference an umbrella agreement in EBS

Original Contract Amount	\$0.00	Amount This Change	\$0.00
Previous Approved Changes	\$0.00	Revised Contract Amount	\$0.00



Adding Attachments

- Use the Attachments tab on the right-hand section of the General tab to upload documents

Create New HRSD Contract Change..

Send Save

General Cost Items

The screenshot displays the 'General' tab of the HRSD system. On the left, the 'General' section contains fields for Title, Record Number, Due Date, and Amount. On the right, the 'Attachments' tab is active, showing a 'Browse...' button and a 'Document Manager...' dropdown. A file upload dialog is open, displaying a table with columns for File Name, File Size, Document Title, Rev. No., and Issue Date. The dialog also includes 'Advanced Options' for file upload, such as 'Include reference files' and 'Upload from My Computer'. The 'Upload' button is highlighted with a red box.

File Name	File Size	Document Title	Rev. No.	Issue Date

Advanced Options

File Upload Options

- Include reference files
- Upload from My Computer
- Revise automatically if file with same name exists

Cancel Upload

Creating HRSD Contract Change – Cost Items Tooltips

Create New HRSD Contract Change..

General **Cost Items**

Add Actions

No.	EBS Task	WBS Code	Code Name
-----	----------	----------	-----------

If the quantity field is used, this change will be sent to EBS as a quantity change. For it to be sent as a services change, quantity must be 0, and the dollar amount field should be used.

Quantity
Used for services req's, not tied to quantity and unit price

Unit Cost \$0.00 **Dollar Amount** \$0.00

Total Change Amount

Amount \$0.00

Cancel Save Save & Add New

Line Item Details

Short Descripti

If you are changing an existing line on the Purchase Order SOV, use the reference field. If you are adding a new line, use the reference field. Replaces the old EBS Task which was a decimal value field

EBS Task ?

Cost Code *

Code Name

Reference

Line Item Description (240) ?

Unit of Measure
Each

This description will be sent to EBS, HOWEVER the field "Short Description" is critical in Unifier and is the only description for the line you will see when doing change orders or payments (invoices)

Line Items Details – Important!

- Adding a new line vs. modifying an existing line
 1. Adding a new line – use EBS Task and Cost Code fields
 2. Changing an existing line – Use the Select icon to open the Commit Line Item Picker window to find the correct line.

Line Item Details

If you are changing an existing line on the Purchase Order SOV, use the reference field. If you want to add a new line to the PO, select a new cost code, and the reference field should show "0"

1

EBS Task ?
Select

Cost Code *
Type CBS Code or Name...

Code Name

2

Reference
Type a Reference No....

Short Description *

Line Item Description (240) ?

Unit of Measure
Each

If the quantity field is used, this change will be sent to EBS as a quantity change. For it to be sent as a services change, quantity must be 0, and the dollar amount field should be used.

Quantity
0

Unit Cost
\$0.00

Dollar Amount ?
\$0.00

Cancel Save Save & Add New



Line Items Details – Important!

- Adding a new line

Line Item Details

If you are changing an existing line on the Purchase Order SOV, use the reference field. If you want to add a new line to the PO, select a new cost code, and the reference field should show "0"

EBS Task ?
Construction WIP

Cost Code *
92305

Code Name
CONSTR CONTRACT ADMIN SERV

Reference
Type a Reference No...

Short Description *
Contract Administration Services

Line Item Description (240) ?
[Empty field]

Unit of Measure
Each

If the quantity field is used, this change will be sent to EBS as a quantity change. For it to be sent as a service change, quantity must be 0, and the dollar amount field should be used.

- Modifying an existing line

Commit Line Item Picker

[Search](#) | [Find on Page](#)

Item #	Ref	Description	CBS Code
000010	1	CONSTRUCTION CONTRACTS	94120

Line Item Details

If you are changing an existing line on the Purchase Order SOV, use the reference field. If you want to add a new line to the PO, select a new cost code, and the reference field should show "0"

EBS Task ?
Construction WIP

Cost Code *
94120

Code Name
CONSTRUCTION CONTRACTS

Reference
1

Short Description *
CONSTRUCTION CONTRACTS

Line Item Description (240) * ?
Additional amount needed for construction contract

Unit of Measure
Each



Line Items Details – Important!

- Quantity vs Dollar Amount

- Quantity and Unit Cost – Goods Billed by Quantity

If the quantity field is used, this change will be sent to EBS as a quantity change. For it to be sent as a services change, quantity must be 0, and the dollar amount field should be used.

Quantity	<input type="text" value="5"/>	Dollar Amount ?	<input type="text"/>
Unit Cost	<input type="text" value="\$1,200.00"/>		

▲ Total Change Amount

Amount	<input type="text" value="\$6,000.00"/>
--------	---

- Dollar Amount – Used for Services

If the quantity field is used, this change will be sent to EBS as a quantity change. For it to be sent as a services change, quantity must be 0, and the dollar amount field should be used.

Quantity	<input type="text" value="0"/>	Dollar Amount ?	<input type="text" value="\$20,000.00"/>
Unit Cost	<input type="text" value="\$0.00"/>		

▲ Total Change Amount

Amount	<input type="text" value="\$20,000.00"/>
--------	--

Cost Codes – Important!

- EBS Task – AKA project phase
 - Previously 10.01, 20.01, etc.
 - **Use WIP** unless purchasing land, or a project that will not result in a capitalizable asset (ex. studies)
 - WIP for Capitalizable projects
 - Non-WIP for Non-Capitalizable projects
 - Land for the purchase of land
 - Directs to the subset of expenditure types that can be selected

The screenshot displays the HRSD Contracts system interface. The main window is titled "HRSD Contracts.." and has tabs for "General", "Cost Items", and "Change Orders". The "Cost Items" tab is active. Below the tabs, there are buttons for "Add", "Actions", "View Currency", and "Transaction Currency". A table lists contract items with columns for "No.", "Line Number", "EBS Task", "Cost Code", and "Code". The first row shows "001", "1", "PrePlanning WIP", "97120", and "PRE-F".

An inset window titled "Line Item Details" is open, showing the "General" tab. It features a dropdown menu for "EBS Task" with "Design WIP" selected. Below the dropdown is a search bar and a list of options: "PrePlanning WIP", "PrePlanning Land", "PrePlanning Non-WIP", "PER WIP", "PER Land", "PER Non-WIP", and "Design WIP". The "Design WIP" option is highlighted at the bottom of the list.

No.	Line Number	EBS Task	Cost Code	Code
001	1	PrePlanning WIP	97120	PRE-F


Cost Codes – Important!



- Cost Code – AKA Expenditure Type
- Must match with EBS Task
 - Verify with the Project Manager if you are unsure of the task
 - Mismatches will be rejected by interface
 - Validations cannot be enforced by Unifier

Create New HRSD Contract Change..

Send Save 


General **Cost Items**



Add Actions 

No.			EBS Task	WBS Code	Code Name	Short Description	Quantity
001				94120	CONSTRUCTION CON...	Line 1	0


Line Item Details Attachments Linked Records

If you are changing an existing line on the Purchase Order SOV, use the reference field. If you want to add a new line to the PO, select a new cost code, and the reference field should show "0"

EBS Task 
Construction WIP

Cost Code *
94120  

Code Name
CONSTRUCTION CONTRACTS





Cost Codes – Important!

- Cost Codes
- For example, if Design WIP is selected as EBS Task, a cost code in the design section must be used:

WBS Code	WBS Item
▶ 10.91000	PRE-SPANNING
▶ 20.91300	PRELIM ENGINEERIN...
▲ 30.92100	DESIGN SERVICES
92440	DESIGN SOFTWARE ...
97100	DESIGN ADVERTISING
97110	DESIGN CAPITALIZED...
97120	DESIGN MISCELLANE...
97130	DESIGN LEGAL
97140	DESIGN PARTNERING
92105	DESIGN - BUDGET
92110	DESIGN-PROGRAM M...
92155	DESIGN AGREEMENT
92125	DESIGN ENVIRONME...
92160	DESIGN BUILD
92170	DESIGN - LOCALITY R...
92175	DESIGN ENVIR DOC

Schedule of Values – SOV

- Unifier SOV tracks Contracts, Change Orders, and Invoice totals per contract record

Create New HRSD Contract Change..

General Cost Items

General

Title *

Workflow Screenshots

Record Number

Due Date

Creator

Stefanie Crowell

Creation Date

Status

Attachments

Comments

Linked Records

Send Save

SOV

Auto-create

Export Line Item Template

Print

Reload

Review ...

Schedule of Values- (Base Record: HRC-000004) - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30362&_uref=uuu937952553t3

File Edit View

Export Import Rows Split Freeze Fund Assignment

Schedule of Values

Currency: United States Dollar (USD)

Item #	Ref	Description		Original Contract Value	Pending Changes	Planned Changes	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments
0010	1	Requesting PER and Design Services	91380	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$0.00
0020	2	DESIGN AGREEMENT	92155	\$0.00	\$0.00	\$250,000.00	\$0.00	\$0.00	\$250,000.00	\$0.00

Schedule of Values- (Base Record: HRC-000004) - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30362&_uref=uuu937952553t3

File Edit View

Export Import Rows Split Freeze Fund Assignment

Schedule of Values

Currency: United States Dollar (USD)

Item #	Ref	Description	WBS Code	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments	Paid to Date	Remaining Balance
0010	1	Requesting PER and Design Services	91380	\$0.00	\$0.00	\$15,000.00	\$0.00	\$0.00	\$15,000.00
0020	2	DESIGN AGREEMENT	92155	\$0.00	\$0.00	\$250,000.00	\$0.00	\$0.00	\$250,000.00



Workflow – Project Manager

- Approve
 - Records <\$50K
 - Sends Contract Specialist or Procurement Specialist

- Send to Chief Review
 - Records >\$50K

Workflow Action Details

Action Details

Workflow Actions *
Approve

Send For
Contract Specialist (Eng)

To
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Dollar Amount ?
\$45,000.00

Workflow Action Details

Action Details

Workflow Actions *
Send For Chief Review

To
Start typing for suggestions...

Due Date Details

Task Due Date

Task Due Date is not available

Dollar Amount ?
\$250,000.00

- Creator Revise
- Approve
 - Sends to either Contract Specialist or Procurement Specialist
 - Determined by Contract/PO Type

Base Contract Information

Reference Commit *
HRC-000004

PO Number
6202077

Contract / PO Type ?
Engineering

Original Contract Amount
\$15,000.00

Previous Approved Changes
\$0.00

Contract Number

Agreement Number ?

Amount This Change
\$250,000.00

Revised Contract Amount
\$265,000.00

Workflow Action Details

Action Details

Workflow Actions *
Approve

To
Start typing for suggestions...

Send For
Contract Specialist (Eng)



Workflow – Contract/Procurement Specialist

- Contract/Procurement Specialist approve
 - Record interfaces with ERP for processing

Previous Approved Changes	Revised Contract Amount
\$0.00	\$265,000.00

Integration Information
Sent via Integration?
Yes

Cost and Schedule Information
Cost Impact: No
Schedule Impact: No

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Stefanie Crowell	HRSD	Completed	Approve	04/30/2020 05:56
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	04/30/2020 05:58
Contract Specialis...	Stefanie Crowell	HRSD	Completed	Send for Integration	04/30/2020 06:01
I01 Int Hold (PO)	Stefanie Crowell	HRSD	Not Started		
I01 Int Hold (PO)	Lisa Matthews	HRSD	Not Started		
I01 Int Hold (PO)	HRSD Administrator	HRSD	Not Started		
I01 Int Hold (PO)	Enstoa HRSD	HRSD	Not Started		

Checking Workflow Progress

- General > Workflow Progress tab
 - Record shows the current workflow step and any previous completed steps

HRSD Contract Change..

General Cost Items

Base Contract Information

Reference Commit
HRC-000002

PO Number
6202074

Contract / PO Type ?
Engineering

Original Contract Amount
\$1,261.11

Previous Approved Changes
\$0.00

Contract Number

Agreement Number ?

Amount This Change
\$12,687.00

Revised Contract Amount
\$13,948.11

Integration Information

Sent via Integration?
Yes

Attachments Comments Linked Records Linked Mail **Workflow Progress** Audit Log Reference Records

Workflow Progress [View Graphic...](#)

Title Record Number Current Step BP Setup Used
CO for PO 6202074 - Existing... HCO-000002 End PM Enters (Integration) V1

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Donna Stinson	HRSD	Completed	Approve	04/30/2020 02:30 PM (UTC-5)
Contract Specialis...	Donna Stinson	HRSD	Completed	Send for Integration	04/30/2020 02:32 PM (UTC-5)
I01 Int Hold (PO)	HRSD Administrator	HRSD	Completed	Approved	04/30/2020 08:19 PM (UTC-5)



- Vendors will submit their invoices in Unifier
- Separate training is being held for Vendors
- Vendors will be able to see the status of their invoices

Questions and Additional Information

- Questions?
- Training slides, recordings, procedures will be posted to [HRSD.com/Doing Business with HRSD/Engineering/Unifier and ERP Portal](https://hrsd.com/Doing-Business-with-HRSD/Engineering/Unifier-and-ERP-Portal)

iSupplier Portal

- Update Supplier Information
- View Purchase Orders / Agreements
- Submit / View Invoices / Pay Applications
- Submit / View Work Confirmations
- View Open Solicitations and Your Responses
- Participate in Online Discussions
- Submit an Online Response to a Solicitation

ERP LOGIN

New to HRSD? [Click here](#) to register for the first time.

Unifier

- View Capital Project Contracts
- Submit / View Capital Project Pay Applications
- Professional Services Deliverables
- Construction Submittals
- Design Review
- Action Items
- Request for Information
- Request for Proposal
- Daily / Weekly Reports
- Meeting Summaries
- Citizen Inquiries

UNIFIER LOGIN

iSupplier Portal How-To Guides

Click [here](#) for Manuals and Guidelines.

Unifier How-To Guides

- For support, users can access the User Productivity Kit (UPK) from any Help menu or send an email to UnifierAdmin@hrsd.com.
- Click [here](#) for password reset instructions

