



Project EVO – Training for Suppliers, Engineers and Inspectors



General Information

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

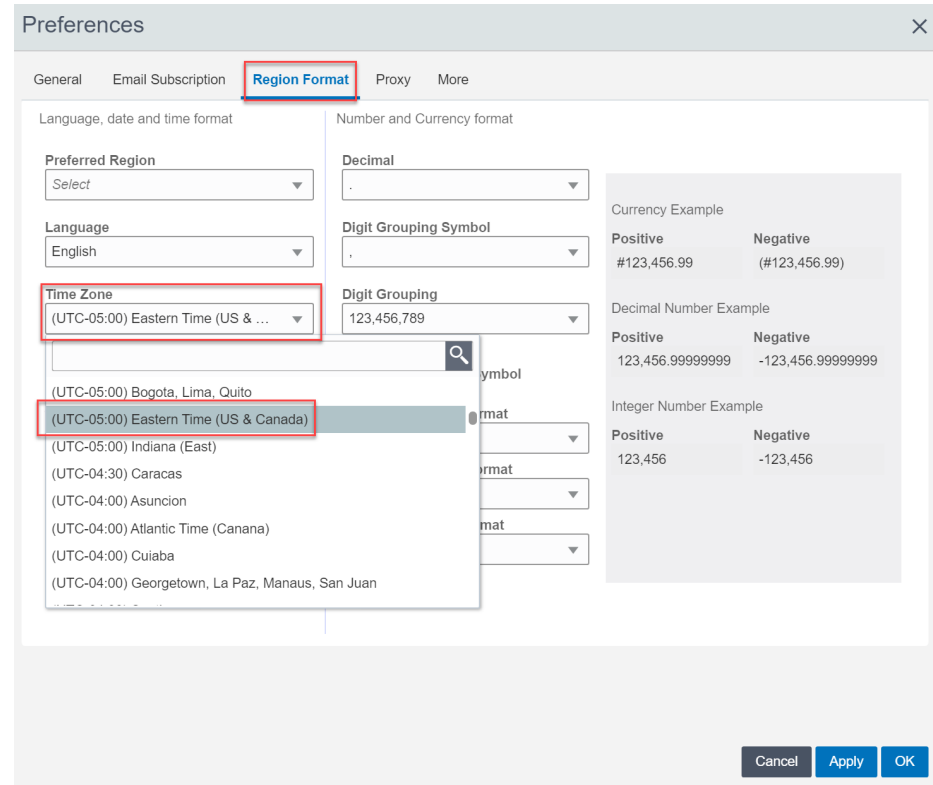
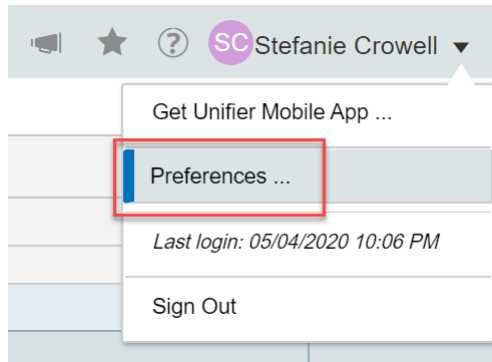
What will NOT be affected - External

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

- 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://erpprodext.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
- June 1st – Cost records for capital projects initiated in Unifier

- Confirm Time Zone Preference



- Contact unifieradmin@hrsd.com for any of the following:
 - Post go-live support
 - Additional training for new Unifier users
- User Productivity Kit (UPK) available within Unifier

Capital Projects > Example Pipeline...

HRSD Contracts..

+ Create Actions View All Records [X] [Refresh] [Print] [Search] [Help]

Record Number	Title	Vendor Name	Contract Number	Am
HRC-000012	Req for New Engineer	1ST QUALITY ELECTR...		

HRSD Contracts.. Help
User Productivity Kit

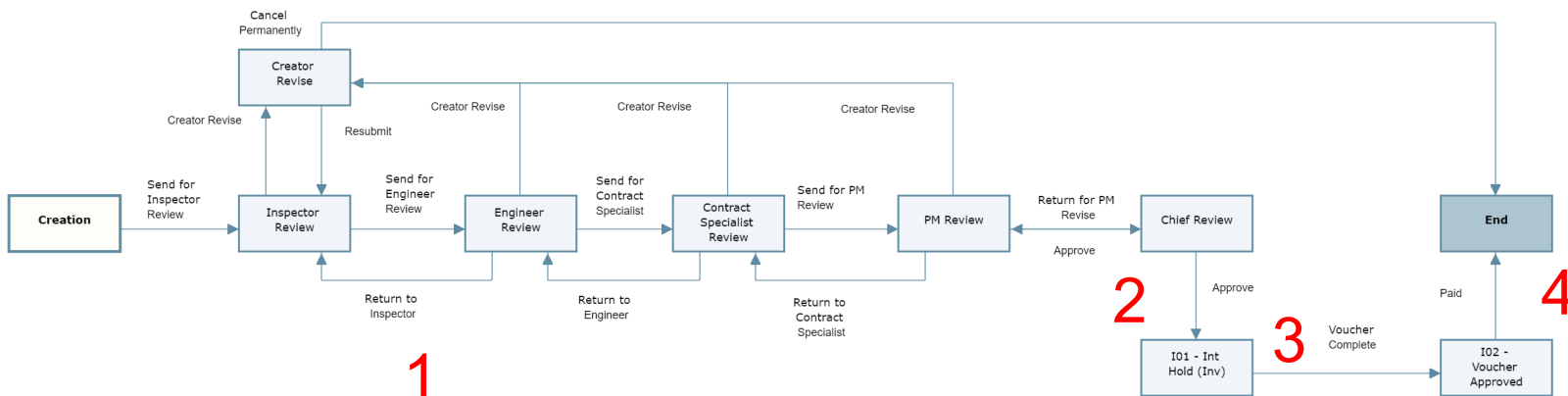


HRSD Payments BP
Contractor Initiated
Inspector and Engineer Approval



HRSD Payments Business Process (BP)

- Used by Contractor to initiate payments
- EBS Work Confirmation = Unifier HRSD Payments
- Flow of information:
 1. HRSD Payments BP created and approved in Unifier
 2. Interface to EBS for payment request
 3. Payment created in EBS
 4. Interface Final Payment Information back to Unifier



Navigation

- Project > Collaboration > Tasks
- Project > Payments BP Logs > HRSD Payments

ORACLE Primavera Unifier (Development)

Company Work... Example Pipelin... +

Example Pipeline Projec... Capital Projects > Example Pipeline...

Alerts

Collaboration -

Tasks

Notifications

Drafts

Cost Manager +

Document Manager +

Schedule Manager +

Payments BP Logs -

HRSD Payments..

+ Create Actions View All Records X Refresh Print Search Help

PO Number	Title	Record Number	Invoice Number	Invoice Date	Vendor Name
6202078	Invoice	HPA-000001	2134	05/01/2020	ZZ Test Supplier

Review – Payment Voucher Tab

- Invoice should be included on Attachments tab

HRSD Payments..

The screenshot displays the HRSD Payments interface. The 'Payment Voucher' tab is active, showing a 'Requested Disbursement' form. The form contains the following fields:

Title	Invoice
Record Number	HPA-000002
Select Appropriate Application	District Contract
Invoice Number	2134
Invoice Date	05/01/2020
Performance End Date	04/30/2020
Account Number	
Unique Invoice ID	103020-2134
Creator	Test Contractor
Creation Date	05/04/2020 08:22 AM (UTC-8)
Status	Pending
Amount	64,000.00
Total Amount	64,000.00

The 'Attachments' tab is also visible, showing a list of 'Unpublished Attachments'. The following attachment is listed:

Name	Title
Invoice.pdf	

Review – Requested Disbursement Tab

- Requested amount(s) should match Invoice Attachment

HRSD Payments..

Payment Voucher **Requested Disbursement**

View Currency Transaction Currency

No.	Cost Code	Code Name	Amount
001	94120	CONSTRUCTION CON...	64,000.00

Total 1

Total Amount 64,000.00

Line Item Details Attachments Linked Records

General

Cost Code
94120

Code Name
CONSTRUCTION CONTRACTS

Short Description
CONSTRUCTION CONTRACTS

Transaction Details

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

Quantity
0

Unit Cost
0.00

Dollar Amount ?
64,000.00

Transaction Totals

Amount
64,000.00



Workflow – Inspector

- Contractor will submit Payments BP to Inspector
- Inspector Workflows
 - Send for Engineer Review
 - Creator Revise

The screenshot displays the HRSD Payments interface. On the left, a 'Payment Voucher' is visible with the title 'Invoice' and record number 'HPA-000002'. The main area shows a 'Workflow Action Details' dialog box. The 'Action Details' section includes a 'Workflow Actions' dropdown menu (highlighted with a red box) with options: 'Select', 'Creator Revise', and 'Send for Engineer Review'. To the right of this dropdown is a 'Send For' field. In the top right corner of the dialog, the 'Send' button is highlighted with a red box, along with a 'Save' button and a menu icon. Below the dialog, there are sections for 'Linked Records' and 'Linked I' with a right arrow, and a 'Title' field with a speech bubble icon.

- Engineer Workflows
 - Send for Contract Specialist
 - Return to Inspector
 - Creator Revise

The screenshot displays the HRSD system interface. On the left, a 'Workflow Action Details' modal is open, showing a dropdown menu for 'Workflow Actions' with options: 'Select', 'Send for Contract Specialist', 'Return to Inspector', and 'Creator Revise'. The 'Send For' field is also visible. On the right, the 'Workflow Progress' section shows a table of workflow steps.

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Test Contractor	ZZ Test Supplier	Completed	Send for Inspecto...	05/01/2020 12:48 PM (UTC-5)
Inspector Review	Stefanie Crowell	HRSD	Completed	Send for Engineer...	05/01/2020 12:52 PM (UTC-5)
Engineer Review	Enstoa HRSD	HRSD	Locked		
Engineer Review	Willy Wonka	HRSD	In Progress		

Checking Workflow Progress

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

HRSD Payments..

Payment Voucher Requested Disbursement

Title: Invoice

Record Number: HPA-000001

Select Appropriate Application: District Contract

Invoice Number: 2134

Invoice Date: 05/01/2020

Performance End Date: 04/30/2020

Account Number

Creator: Test Contractor

Creation Date: 05/01/2020 09:48 AM (UTC-8)

Status: Pending

Amount: 50,000.00

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

Workflow Progress

View Graphic...

Title: Invoice | Record Number: HPA-000001 | Current Step: Engineer Review | BP Setup Used: Contractor Enters (Integration...)

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Test Contractor	ZZ Test Supplier	Completed	Send for Inspector Review	05/01/2020 09:48 AM (UTC-8)
Inspector Review	Stefanie Crowell	HRSD	Completed	Send for Engineer Review	05/01/2020 09:52 AM (UTC-8)
Engineer Review	Enstoa HRSD	HRSD	Not Started		
Engineer Review	Willy Wonka	HRSD	Not Started		

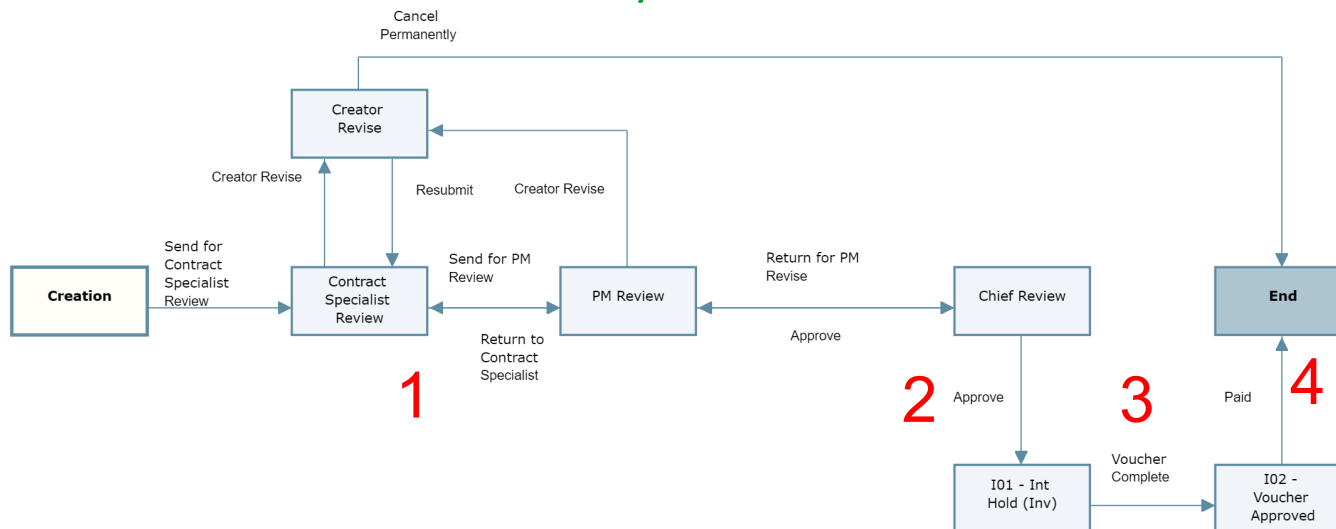


HRSD Payments BP Supplier or Engineer Initiated



HRSD Payments Business Process (BP)

- Used to initiate payments
- EBS Work Confirmation = Unifier HRSD Payments
- Flow of information:
 1. HRSD Payments BP created and approved
 2. Interface to EBS for payment request
 3. Payment created in EBS
 4. Interface Final Payment Information back to Unifier



- Project > Payments BP Logs > HRSD Payments > Create

The screenshot shows the HRSD software interface. On the left is a dark sidebar with navigation items: Home, Example Pipeline Projec..., Alerts, Collaboration, Cost Manager, Document Manager, Schedule Manager, Payments BP Logs, and Contractual BP Logs. The 'Payments BP Logs' item is expanded, and 'HRSD Payments..' is selected and highlighted with a red box. The main content area shows a breadcrumb trail 'Capital Projects > Example Pipeline...' also highlighted with a red box. Below the breadcrumb is the title 'HRSD Payments..' and a '+ Create' button, which is also highlighted with a red box. To the right of the 'Create' button are 'Actions' and 'View' dropdown menus, and several utility icons. Below these is a table header with columns: PO Number, Title, Record Number, Invoice Number, and Invoice Date.

PO Number	Title	Record Number	Invoice Number	Invoice Date
-----------	-------	---------------	----------------	--------------

Creating HRSD Payments – Required Metadata

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Title *

Record Number

Select Appropriate Application
District Contract

Invoice Number *

Invoice Date *
MM/DD/YYYY

Performance End Date ?
MM/DD/YYYY

Account Number

Unique Invoice ID

Creator
Willy Wonka

Creation Date

Status

Amount

Total Amount

HRSD Contracts..

Search | Find on Page

Project Number	Record Number	PO Number	Vendor Name	Title	Status
Proj0640	MIGa-6160804	6160804	HDR ENGINEERING INC	Migrated PO: 6160804	Approved
Proj0640	MIG-CE01062	CE01062	HAZEN AND SAWYER ...	Migrated PO: CE01062	Approved
Proj0640	MIG-6201088	6201088	BRIDGEMAN CIVIL INC	Migrated PO: 6201088	Approved
Proj0640	MIG-6181427	6181427	AECOM TECHNICAL S...	Migrated PO: 6181427	Approved
Proj0640	MIG-6173598	6173598	TA SHEETS GENERAL...	Migrated PO: 6173598	Approved
Proj0640	MIG-6161038	6161038	PRECISION MEASUR...	Migrated PO: 6161038	Approved
Proj0640	MIG-6160804	6160804	HDR ENGINEERING INC	Migrated PO: 6160804	Approved
Proj0640	MIG-6160404	6160404	INFOR US INC	Migrated PO: 6160404	Approved
Proj0640	HRC-000078	6202065	CH2M HILL ENGINEE...	SIT 05 REQ 04 - Quantily	Approved
Proj0640	HRC-000077	6202063	HAZEN AND SAWYER ...	SIT 05 REQ 03	Approved
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

Total: 39

Cancel Select

Vendor Info

Reference Commit *
Type a Record Number...

Vendor Name ?
HAZEN AND SAWYER PC

PO Number
6202063

Vendor Number
101703

Vendor Info

Reference Commit *
HRC-000077

Vendor Name ?
HAZEN AND SAWYER PC

PO Number
6202063

Vendor Number
101703



Adding Attachments

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

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Title *

Record Number

Select Appropriate Application
District Contract

Invoice Number *

Invoice Date *

Creator
Stefanie Crowell

Creation Date

Status

Amount

Attachments

Browse...

Document Manager...

Upload Files - Google Chrome

uhrsd-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 Payments – Tooltips

Payment Voucher Requested Disbursement

Record Number

Creator
Stefanie Crowell

Select Appropriate Application
District Contract

Creation Date

Invoice Number *

Status

Invoice Date *
MM/DD/YYYY
To be filled in by Contractor

Amount

Performance End Date ?
MM/DD/YYYY

Account Number

Unique Invoice ID
101703-

Total Amount

Vendor Info

Reference Commit *
HRC-000077
This is the new extended (250 chars) vendor name

PO Number

Vendor Name ?
HAZEN AND SAWYER PC

Vendor Number
101703

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Add Actions

No.	Cost Code	Code Name

Line Item Details

Code Name

Short Description *

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

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

Unit Cost \$0.00 Dollar Amount ? \$0.00

Transaction Totals

Amount \$0.00

Total Amount \$0.00

Total: 0

Cancel Save Save & Add New

Creating HRSD Payments – Requested Disbursement

Create New HRSD Payments.. Send Save

Payment Voucher **Requested Disbursement**

1 **Add** **Actions** ▾

No. ▾			Cost Code	Code Name	Amount

SOV Picker ×

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

Item #	Ref	Description	CBS Code	Breakdown
000010	1	CONSTRUCTION CONTRACTS	94120	
000020	2	CONSTR CONTRACT ADMIN SERV	92305	

Total: 2

Cancel **Select**

Total: 0 Total Amount ▾ : \$0.00

Line Item Details

▾ **General**

Cost Code * 2

Code Name

Short Description *

▾ **Transaction Details**

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

Quantity

Unit Cost Dollar Amount ?

▾ **Transaction Totals**

Amount

Cancel **Save** **Save & Add New**



Transaction Details – Important!

- Determined by the type of contract
- Quantity vs Dollar Amount
 1. Quantity and Unit Cost – Goods Billed by Quantity

Transaction Details

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

Quantity	4	Dollar Amount ?	\$0.00
Unit Cost	\$450.00		

Transaction Totals

Amount	\$1,800.00
--------	------------

2. Dollar Amount – Used for Services

Transaction Details

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

Quantity		Dollar Amount ?	\$2,400.00
Unit Cost			

Transaction Totals

Amount	\$2,400.00
--------	------------

Schedule of Values – SOV

- Tracks Contracts, Change Orders, and Invoice totals per contract record
- Can be used to determine the Remaining Balance for each line item

Create New HRSD Payments..

Payment Voucher **Requested Disbursement**

Add Actions

No. Cost Code Code Name Amount

Line Item Details

General Cost Code *

Send Save

SOV

Export Line Item Template

Print

Reload

Schedule of Values - (Base Record: HRC-000009) - Google Chrome

uhrs-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30402&__uref=uuu978787973t2

File Edit View

Export Import Rows Split Freeze Fund Assignment

Schedule of Values

Currency: **United States Dollar (USD)**

Item #	Ref	Description	WE	Original Contract Value	Pending Changes	Planned Changes	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments
000010	1	CONSTRUCTION CONTRACTS	94120	\$250,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250,000.00	\$64,000.00
000020	2	CONSTR CONTRACT ADMIN SERV	92305	\$0.00	\$0.00	\$17,000.00	\$0.00	\$0.00	\$17,000.00	\$0.00

Schedule of Values

Currency: **United States Dollar (USD)**

Item #	Ref	Description	WB	Planned Changes	Unplanned Changes	Migrated Change Value	Current Scheduled Value	Pending Payments	Paid to Date	Remaining Balance
00010	1	CONSTRUCTION CONTRACTS	94120	\$0.00	\$0.00	\$0.00	\$250,000.00	\$64,000.00	\$0.00	\$250,000.00
00020	2	CONSTR CONTRACT ADMIN SERV	92305	\$17,000.00	\$0.00	\$0.00	\$17,000.00	\$0.00	\$0.00	\$17,000.00

- Supplier/Engineer sends for Contract Specialist Review

Workflow Action Details

Action Details

Workflow Actions: Send for Contract Specialist Review

Send For: Contract Specialist Review

To: Start typing for suggestions...

- Internal HRSD Workflow

HRSD Payments..

Payment Voucher Requested Disbursement

Vendor Name: ZZ Test Supplier

Vendor Number: 103020

Comments

Payment Information

Check No. [redacted]

Actual Payment Date [redacted]

Check Amount: \$0.00

Sent via Integration? - ADMIN ONLY: Yes

Workflow Progress

Workflow Progress

Workflow Progress

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Willy Wonka	HRSD	Completed	Send for Contract ...	05/04/2020 02:20 PM (UTC-5)
Contract Specialis...	Stefanie Crowell	HRSD	Completed	Send for PM Review	05/04/2020 02:24 PM (UTC-5)
PM Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 02:24 PM (UTC-5)
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 02:27 PM (UTC-5)
I01 - Int Hold (Inv)	Stefanie Crowell	HRSD	Not Started		
I01 - Int Hold (Inv)	HRSD Administrator	HRSD	Not Started		
I01 - Int Hold (Inv)	Enstoa HRSD	HRSD	Not Started		

interface



Checking Workflow Progress

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

HRSD Payments..

Payment Voucher Requested Disbursement

Unique Invoice ID: 100870-Retainage 05 05 20 - 01 Total Amount: \$20,000.00

Vendor Info

Reference Commit: HRC-000018 PO Number: 6201525

Vendor Name: CH2M HILL ENGINEERS INC Vendor Number: 100870

Comments

Payment Information

Check No.: 4029301 Actual Payment Date: 05/05/2020

Check Amount: \$19,000.00 Sent via Integration?: Yes

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

Workflow Progress

Title: Retainage 05 05 20 - 01 Record Number: HPA-000008 Current Step: End BP Setup Used: Engineer Enters (Integration) ...

Filter By: Visited Steps

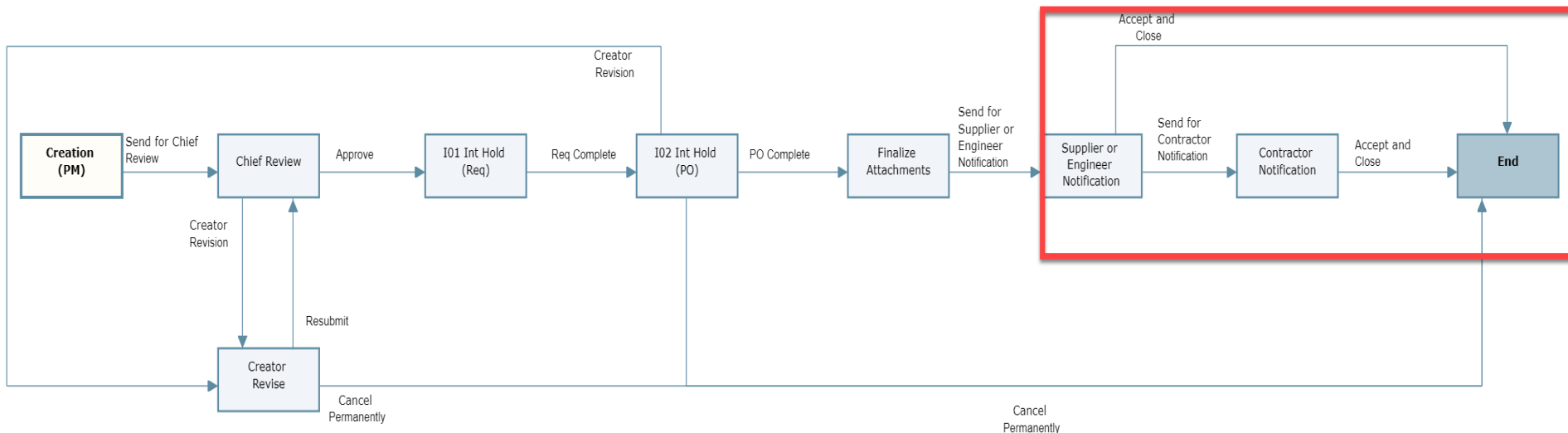
Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Donna Stinson	HRSD	Completed	Send for Contract Specialist Review	05/05/2020 06:42 AM
Contract Specialist Review	Donna Stinson	HRSD	Completed	Send for PM Review	05/05/2020 06:44 AM
PM Review	Donna Stinson	HRSD	Completed	Approve	05/05/2020 06:45 AM
Chief Review	Donna Stinson	HRSD	Completed	Approve	05/05/2020 06:45 AM
I01 - Int Hold (Inv)	HRSD Administrator	HRSD	Completed	Voucher Complete	05/05/2020 07:04 AM
I02 - Voucher Approved	HRSD Administrator	HRSD	Completed	Paid	05/05/2020 07:11 AM



HRSD Contracts BP

HRSD Contracts Business Process (BP)

- Used by Project Managers to initiate Requisitions
- Bid/Solicitation process will take place in ERP
- Supplier or Engineer Notification step:
 - Notification will be emailed to Supplier/Engineer with final attachments regarding any Agreement/Contract awarded



- Project > Collaboration > Tasks
- Project > Contractual BP Logs > HRSD Contracts

The screenshot shows a web application interface. At the top, there are tabs for 'Company Work...' and 'Example Pipelin...'. A sidebar on the left contains a navigation menu with items like 'Example Pipeline Project - Home', 'Alerts', 'Collaboration', 'Tasks', 'Notifications', 'Drafts', 'Document Manager', 'Schedule Manager', 'Payments BP Logs', 'Contractual BP Logs', and 'HRSD Contracts..'. The 'Collaboration' and 'Contractual BP Logs' items are highlighted with red boxes. The main content area shows a breadcrumb trail 'Capital Projects > Example Pipeline...' and a title 'HRSD Contracts..'. Below the title is a toolbar with buttons for 'Actions', 'View', 'All Records', and various utility icons. A table displays contract data with columns for Record Number, Contract Number, Requisition Number, PO Number, and Title.

		Record Number	Contract Number	Requisition Number	PO Number	Title
		HRC-000005		3202740	6202078	Requisition fo
		HRC-000004		3202736	6202077	Requisition fo

HRSD Contracts – Supplier or Engineer Notification

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

The screenshot displays 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 'Engineer Notificati...' step highlighted in red, indicating it is the current step.

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 Notificati...	Willy Wonka	HRSD	In Progress

Checking Workflow Progress

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

HRSD Contracts..

[General](#) [Cost Items](#) [Change Orders](#)

Integrated EBS Fields

Contract / PO Type Engineering	Agreement Number
Unifier Integration ID 84127971	
Requisition Number 3201967	PO Number 6201516
Requisition Date 05/04/2020	PO Issued Date 05/04/2020
Creator for EBS	Requestor for EBS Stefanie Crowell
Sent via Integration? Yes	

[Attachments](#) [Comments](#) [Linked Records](#) [Linked Mail](#) [Workflow Progress](#) [Audit Log](#) [Reference R...](#)

Workflow Progress

[View Graphic...](#)

Title Requisition for Engineering S... **Record Number** HRC-000008 **Current Step** End **BP Setup Used** PM Enters (Integration) V1

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (PM)	Stefanie Crowell	HRSD	Completed	Send for Chief Re...	05/04/2020 09:04 AM (UTC-5)
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 09:04 AM (UTC-5)
I01 Int Hold (Req)	HRSD Administrator	HRSD	Completed	Req Complete	05/04/2020 10:04 AM (UTC-5)
I02 Int Hold (PO)	HRSD Administrator	HRSD	Completed	PO Complete	05/04/2020 10:47 AM (UTC-5)
Finalize Attachme...	Stefanie Crowell	HRSD	Completed	Send For Enginee...	05/04/2020 11:03 AM (UTC-5)
Engineer Notificati...	Willy Wonka	HRSD	Completed	Accept and Close	05/04/2020 11:07 AM (UTC-5)

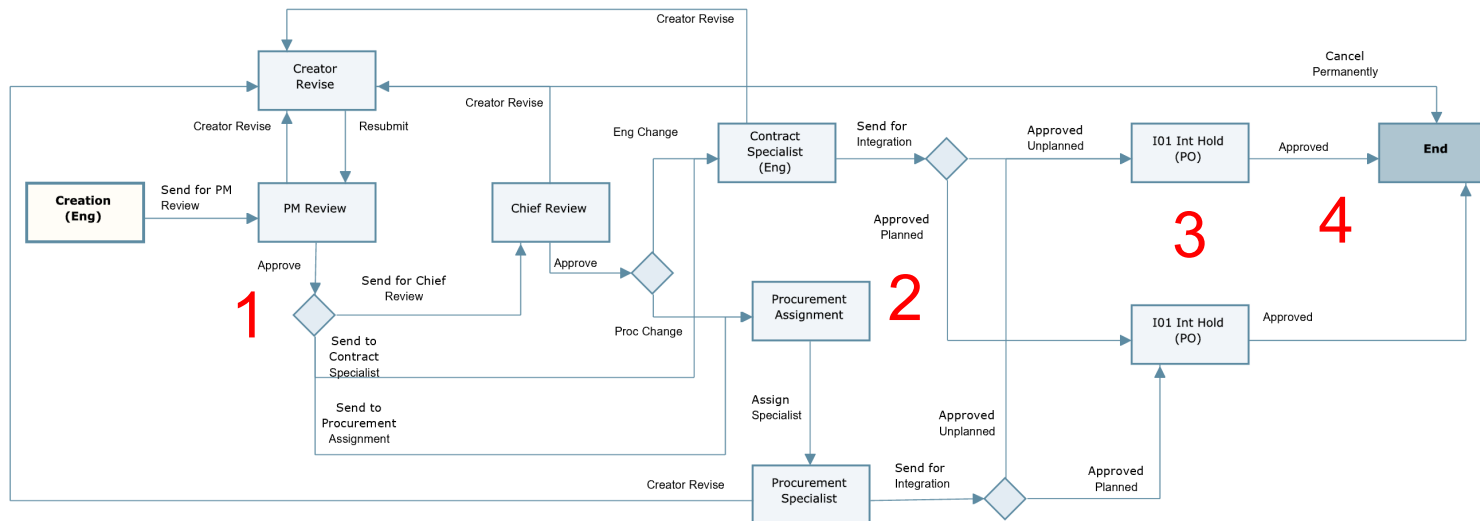


HRSD Contract Change BP



HRSD Contract Change Business Process (BP)

- Used by Engineers to initiate Change Orders
- Flow of information:
 1. HRSD Contract Change BP created and approved
 2. Interface to EBS for changes to original PO
 3. Lines items added/updated in ERP
 4. Interface Line Item information back to Unifier



- 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 Metadata

Create New HRSD Contract Change..

General Cost Items

General

Title *

Record Number

Due Date

Amount

StartDate

Creator **Stefanie Crowell**

Creation Date

Status

Account Number

FinishDate

Need by Date

Justification

Contract Type

Planned or Unplanned? *

Change Category

Has the corresponding risk item been resolved?

Reason for Change

Analysis of Reconn

Reference Commit *

Should Construction Contractor be able to View approved record?

PO Number

Contract / PO Type ?

Original Contract Amount

Previous Approved Changes

Contract Number

Agreement Number ?

Amount This Change

Revised Contract Amount

Vendor Information

Vendor Name ?

Location Name

Integration Info

Sent via Integration

HRSD Contracts..

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.A.WELL AND SEP...	SIT City 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

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

Agreement Number ?

Original Contract Amount
\$200,000.00

Amount This Change
\$100.00

Previous Approved Changes
\$0.00

Revised Contract Amount
\$200,100.00

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

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

Agreement Number ?

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 - Contractor

Type a Record Number...

Reference Commit *

Type a Record Number...

Should Construction Contractor be able to View approved record?

Select

PO Number

Used to determine which workflow path this record will follow

Contract Number

Used to reference a blanket agreement in EBS

Contract / PO Type ?

Agreement Number ?

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

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) ?

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, showing a table with columns: "No.", "Line Number", "EBS Task", "Cost Code", and "Code". A single row is visible with values: "001", "1", "PrePlanning WIP", "97120", and "PRE-F".

Below the table, there is a "Line Item Details" panel with tabs for "Line Item Details", "Attachments", and "Linked Records". The "Line Item Details" tab is active, showing a "General" section with an "EBS Task" dropdown menu. The dropdown is open, showing 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. The "EBS Task" field in the form above the dropdown is also highlighted with a red box.

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
 - Mismatches will be rejected by interface
 - Unfortunately, selections cannot be enforced by the system

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..

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

uhrsd-stage-unifier.oracleindustry.com/bp/sov/view/processing?docid=0&recordid=30362&_uref=uuu752217758t3

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
000010	1	Requesting PER and Design Services	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$0.00
000020	2	DESIGN AGREEMENT	\$0.00	\$0.00	\$250,000.00	\$0.00	\$0.00	\$250,000.00	\$0.00

- Engineer sends record for Project Manager Review

The screenshot displays the 'Workflow Action Details' window in the HRSD system. The window is divided into three main sections:

- Left Panel (Create New HRSD Contract):** Shows fields for 'Title' (Change Order 1), 'Record Number', 'Due Date' (MM/DD/YYYY HH:MM AM), 'Amount', and 'StartDate' (MM/DD/YYYY HH:MM AM).
- Center Panel (Workflow Action Details):**
 - Action Details:** A red box highlights the 'Workflow Actions' dropdown menu (set to 'Send for PM Review') and the 'Send For' field (set to 'PM Review').
 - To:** A text field containing 'HRSD Administrator;Stefanie Crowell;Project Managers'.
 - Due Date Details:** A section for 'Task Due Date' with a message: 'Task Due Date is not available'.
- Right Panel (Document View):** Shows a 'Send' button (highlighted with a red box), a 'Save' button, and a dropdown menu. Below this are tabs for 'Comments', 'Linked Records', and 'Linked Mail'. A table lists attachments with columns for 'Name' and 'Title', showing 'Construction Contract.docx'.

Checking Workflow Progress

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

HRSD Contract Change.. Accept Decline ☰

General Cost Items

Vendor Information

Vendor Name ? Vendor Number

ZZ Test Supplier 103020

Contractor Notification

Contractor Notification Creator

Integration Information

Sent via Integration? - ADMIN ONLY

Yes

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

Workflow Progress View Graphic...

Title	Record Number	Current Step	BP Setup Used
Change Order 1	HCO-000002	I01 Int Hold (PO)	Engineer Enters (Integration)...

Filter By: Visited Steps ▼

Step Name	Assignee	Company	Status	Action	Completion Date
Creation (Eng)	Willy Wonka	HRSD	Completed	Send for PM Revi...	05/03/2020 03:23 PM (UTC-5)
PM Review	Stefanie Crowell	HRSD	Completed	Approve	05/03/2020 03:29 PM (UTC-5)
Contract Specialis...	Stefanie Crowell	HRSD	Completed	Send for Integration	05/03/2020 03:30 PM (UTC-5)
I01 Int Hold (PO)	Enstoa HRSD	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)	Stefanie Crowell	HRSD	Not Started		

- 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

