



Project EVO – Training for Contractors



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.

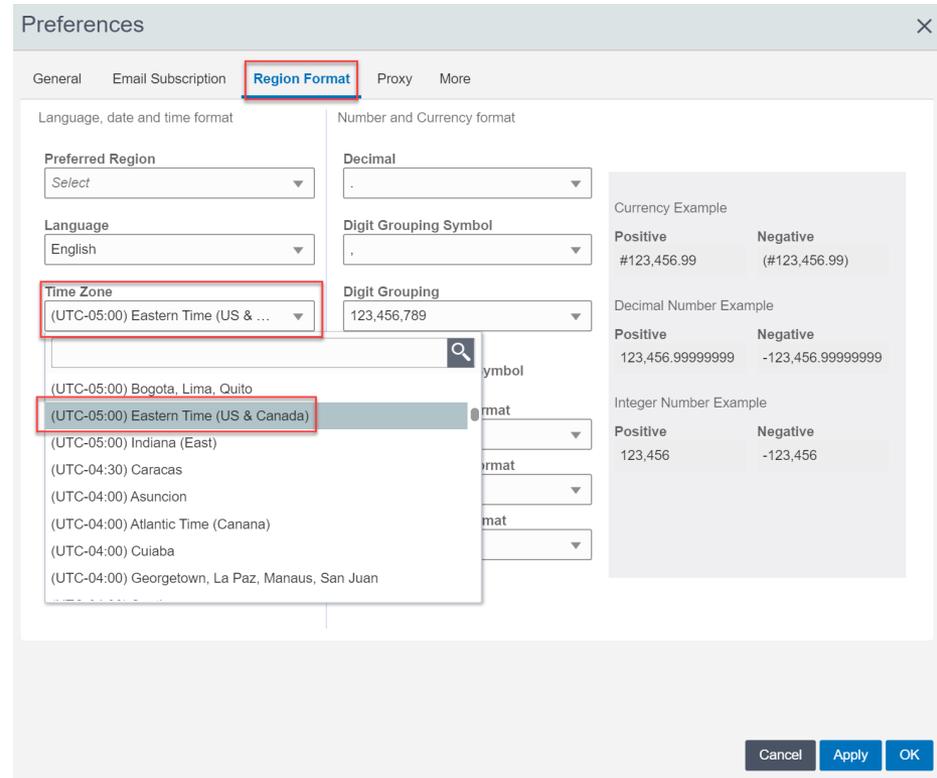
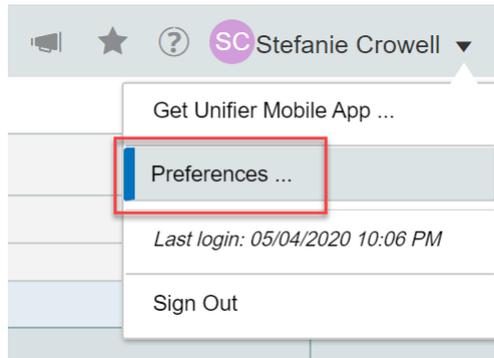
What will NOT be affected - External

- 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...		

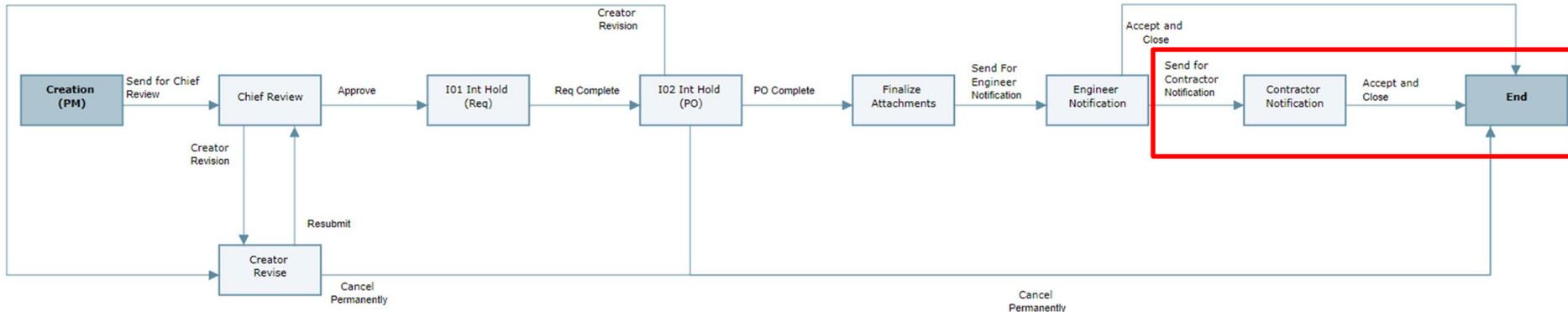
HRSD Contracts.. Help
User Productivity Kit



HRSD Contracts BP

HRSD Contracts Business Process (BP)

- Used by Project Managers to initiate Requisitions
- Bid/Solicitation process will take place in ERP
- Contractor Notification step:
 - Notification will be sent to Contractors with final attachments regarding any awarded HRSD Contracts



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

The screenshot displays a web application interface. At the top, there are tabs for 'Company Work...' and 'Example Pipelin...'. A left sidebar 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 with columns 'Record Number', 'Contract Number', 'Requisition Number', 'PO Number', and 'Title' is displayed. The table contains two rows of data.

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

HRSD Contracts – Contractor Notification

- Contractor awarded contract will be notified and be able to view final attachments
- Workflow
 - Accept and Close for record to reach Approved status

The screenshot displays a web browser window with the URL `uhrsd-stage-unifier.oracleindustry.com/bp/mod/bp/record/opentask/29087228/undefined/undefined?_uref=uuu718704910t2`. The main page is titled "HRSD Contracts.." and shows a "General" tab with fields for Title ("Requisition for Engineering Services"), Record Number ("HRC-000004"), and Due Date. A "Send" button is highlighted with a red box in the top right corner of the main page. A "Workflow Action Details" dialog box is open in the center, showing "Action Details" with a "Workflow Actions" dropdown menu set to "Accept and Close" and a "Send For" field set to "End".

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

Budget Status Commissioning Status

Integrated EBS Fields

Contract / PO Type Agreement Number

Engineering

Unifier Integration ID

84127972

Requisition Number PO Number

3201968 6201517

Requisition Date PO Issued Date

05/04/2020 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 Re

Workflow Progress View Graphic...

Title	Record Number	Current Step	BP Setup Used
Requisition for Construction...	HRC-000009	End	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 06:07 AM (UTC-8)
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 06:08 AM (UTC-8)
I01 Int Hold (Req)	HRSD Administrator	HRSD	Completed	Req Complete	05/04/2020 07:12 AM (UTC-8)
I02 Int Hold (PO)	HRSD Administrator	HRSD	Completed	PO Complete	05/04/2020 07:47 AM (UTC-8)
Finalize Attachme...	Stefanie Crowell	HRSD	Completed	Send For Enginee...	05/04/2020 08:05 AM (UTC-8)
Engineer Notificati...	Willy Wonka	HRSD	Completed	Send for Contract...	05/04/2020 08:08 AM (UTC-8)
Contractor Notific...	Test Contractor	ZZ Test Supplier	Completed	Accept and Close	05/04/2020 08:10 AM (UTC-8)

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



HRSD Contract Change Notification

- Project > Collaboration > Notification
- Project > Contractual BP Logs > HRSD Contract Change Notification

The screenshot displays the Oracle Primavera Unifier (Development) interface. The top navigation bar includes 'Company Work...', 'Example Pipelin...', 'Pedros Project', and 'Example Pipelin...'. The left sidebar menu is expanded, showing 'Collaboration' and 'Contractual BP Logs' highlighted with red boxes. Below 'Contractual BP Logs', 'HRSD Contract Change Notification' is also highlighted with a red box. The main content area shows 'HRSD Contract Change Notification' with a table of records.

Record Number	Contract Number	Title	Status
CN-000001		Change Order 2	Closed

Contract Change Notification Record

HRSD Contract Change Notification

Contractor Notification Line Details

General

Title
Change Order 2

Record Number
CN-000001

Due Date

Amount

Creator
Enstoa HRSD

Creation Date
05/11/2020 10:23 AM

Status
Closed

Account Number

Attachments

Name
Unpublished Attachments
<input checked="" type="checkbox"/> CO 1.pdf

HRSD Contract Change Notification

Contractor Notification **Line Details**

View Currency Transaction Currency

No.	WBS Code	Code Name	Short Description
001	94120	CONSTRUCTION CON...	CONSTRUCTION CONTRACTS

Line Item Details

EBS Task
Construction WIP

Cost Code
94120

Code Name
CONSTRUCTION CONTRACTS

Short Description
CONSTRUCTION CONTRACTS

Line Item Description (240)
Test

Unit of Measure

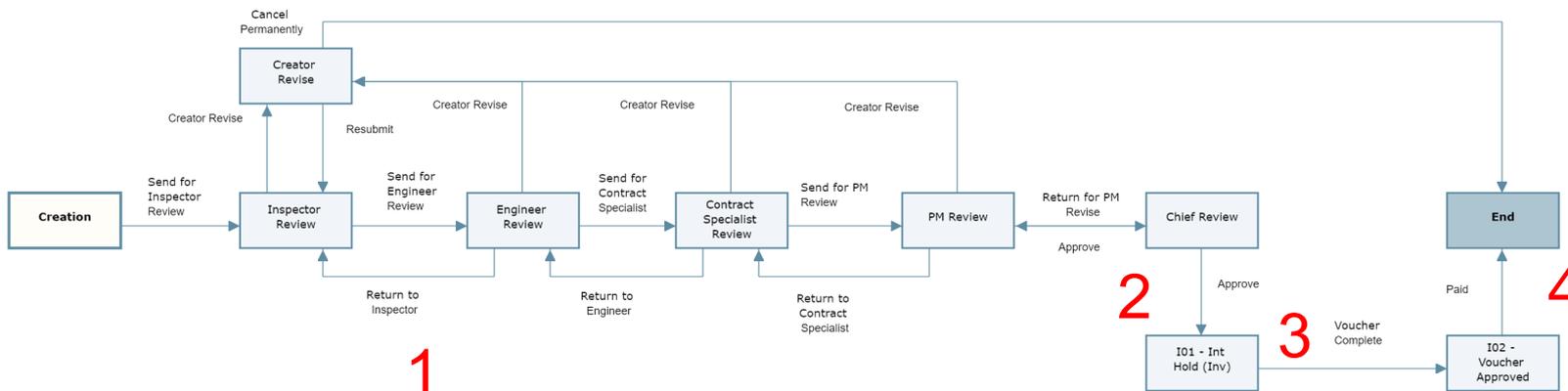


HRSD Payments BP



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 in Unifier
 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 displays the HRSD software interface. On the left is a dark sidebar with a list of navigation items: Home, Example Pipeline Projec..., Alerts, Collaboration, Cost Manager, Document Manager, Schedule Manager, Payments BP Logs, HRSD Payments.., and Contractual BP Logs. The 'HRSD Payments..' 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 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 a series of utility icons. Below these elements is a table header with columns: PO Number, Title, Record Number, Invoice Number, and Invoice Date.

Creating HRSD Payments – Required Metadata

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Title *

Record Number

Creator
Test Contractor

Select Appropriate Application
District Contract

Creation Date

Status

Amount

Invoice Number *

Invoice Date *
MM/DD/YYYY

Performance End Date *
MM/DD/YYYY

Account Number

Unique Invoice ID

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 - Quantity	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: 3

Cancel Select

Vendor Info

Reference Commit *
Type a Record Number...

Vendor Name ?

PO Number

Vendor Number

Vendor Info

Reference Commit *
HRC-000077

Vendor Name ?
HAZEN AND SAWYER PC

PO Number
6202063

Vendor Number
101703

Creating HRSD Payments – Tooltips

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Title *

Record Number

Creator
Test Contractor

Select Appropriate Application
District Contract

Creation Date

Invoice Number *

Status

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

Amount
0.00

Performance End Date *
MM/DD/YYYY

Account Number

Unique Invoice ID

Total Amount
0.00

Vendor Info

Reference Commit * PO Number

Type a Record Number This is the new extended (250 chars) vendor name

Vendor Name * Vendor Number

Create New HRSD Payments..

Payment Voucher Requested Disbursement

Send Save

Add Actions

No.	Cost Code	Code Name
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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.

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

Unit Cost Dollar Amount

\$0.00 \$0.00

Transaction Totals

Amount
\$0.00

Total: 0

Total Amount \$0.00

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

2 **Cost Code ***

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
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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
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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



Workflow - Contractor

- Contractor submits Payment BP to Inspector for review

The screenshot displays the 'Create New HRSD Payments.. Requested Disbursement' interface. A 'Workflow Action Details' dialog box is open, showing the following configuration:

- Workflow Actions:** Send for Inspector Review
- Send For:** Inspector Review
- To:** Stefanie Crowell

A red box highlights the 'Send' button in the top right corner of the dialog box.

Checking Workflow Progress

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

HRSD Payments..

Payment Voucher Requested Disbursement

HRC-000015	6201512
Vendor Name ? CH2M HILL ENGINEERS INC	Vendor Number 100870

Comments

Description

Paying

Payment Information

Check No. 4029309	Actual Payment Date 05/06/2020
Check Amount \$950.01	Sent via Integration? - ADMIN ONLY 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
UAT 01 PAY 06	HPA-000011	End	Contractor Enters (Integration...

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Enstoa HRSD	HRSD	Completed	Send for Inspecto...	05/06/2020 10:24 AM
Inspector Review	HRSD Administrator	HRSD	Completed	Send for Engineer...	05/06/2020 10:26 AM
Engineer Review	Donna Stinson	HRSD	Completed	Send for Contract...	05/06/2020 10:27 AM
Contract Specialis...	Donna Stinson	HRSD	Completed	Send for PM Revi...	05/06/2020 10:27 AM
PM Review	Donna Stinson	HRSD	Completed	Approve	05/06/2020 10:27 AM
Chief Review	Donna Stinson	HRSD	Completed	Approve	05/06/2020 10:28 AM
I01 - Int Hold (Inv)	HRSD Administrator	HRSD	Completed	Voucher Complete	05/06/2020 10:43 AM
I02 - Voucher App...	HRSD Administrator	HRSD	Completed	Paid	05/06/2020 10:47 AM

- 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

