



Project EVO – Training for Project Managers



General Information



Why Project Evo?

- 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 Change – Project Management

- Initiation and approval in Unifier:
 - Requisitions for capital projects
 - Change Orders for capital projects
 - Invoices against capital PO's
- Project and Program Forecasts
 - P6 integration in progress
- Risk Management
- Vendor and Ship-To integration

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

What will NOT be affected - Internal

- iExpense
- Payment (check) requests for non-PO invoice
- Receiving
- Assigning of Requisitions

- 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 – GO LIVE - Cost records for capital projects initiated in Unifier
- Post go-live support: unifieradmin@hrsd.com

- 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
- Note: Chrome is the preferred browser



Project Appropriation

Project Appropriation

- Budget BP Node>Appropriated Budget
- Unifier must at least have a Pending Appropriation to allow for initiation of Contract or Contract Change
- Appropriations should be budgeted to the Task Budget codes

Cost Sheet

View Default Currency : United States Dollar (USD)

	WBS Code	WBS Item	CIP Budget Pending	CIP Budget	Appropriated Budget	Appropriated Budget (Pending)	Cu
10	97130	PRE-PLANNING LEGAL	\$0.00	\$0.00	\$0.00	\$0.00	
11	97140	PRE-PLANNING PART...	\$0.00	\$0.00	\$0.00	\$0.00	
12	91210	STUDY	\$0.00	\$0.00	\$0.00	\$0.00	
13	⊖ 20.91300	PRELIM ENGINEERIN...	\$0.00	\$2,000,000.00	\$2,000,000.00	\$0.00	
14	91330	PER-BUDGET	\$0.00	\$2,000,000.00	\$2,000,000.00	\$0.00	
15	91310	PER PROGRAM MAN...	\$0.00	\$0.00	\$0.00	\$0.00	
16	91335	PER-GEOTECHNICAL	\$0.00	\$0.00	\$0.00	\$0.00	
17	91340	PER - SUE	\$0.00	\$0.00	\$0.00	\$0.00	
18	91345	PER-ENV ASSESSMENT	\$0.00	\$0.00	\$0.00	\$0.00	
19	91350	PER - VALUE ENGINE	\$0.00	\$0.00	\$0.00	\$0.00	



Unfier Budget Check

Workflow Action Details

Rule Exceptions

1 Error(s)

Rule Level	Data Identifier	Description	Trigger Value	Current Value
Per Total for...		Insufficient Budget	\$1,036,200.00	\$1,180,834.56

Close

Cancel Send Save Save & Add New

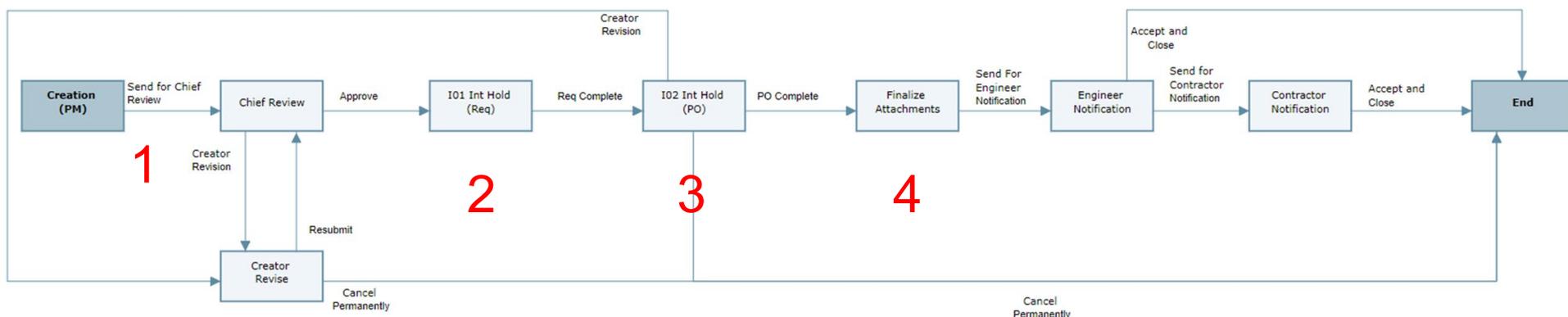


HRSD Contracts Project Manager Initiated



HRSD Contracts Business Process (BP)

- Used by Project Managers to initiate Requisitions
- EBS Requisitions = Unifier's HRSD Contracts 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



- 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...' and 'HRSD Contracts..' items are highlighted with red boxes. The main content area shows a breadcrumb path 'Capital Projects > Example Pipeline...' at the top, also highlighted with a red box. Below it is the title 'HRSD Contracts..' and a toolbar with buttons for '+ Create', 'Actions', 'View', 'All Records', and various utility icons. A table with the following columns is visible: Record Number, Contract Number, Requisition Number, PO Number, Title, Vendor Name, Amount, and Status. The first row of data contains: Record Number: HRC-000001, Contract Number: (empty), Requisition Number: (empty), PO Number: (empty), Title: Requisition for Enginee..., Vendor Name: DESIGN ENGINEERIN..., Amount: \$2.00, and Status: Pe.

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

Creating HRSD Contracts – Required Metadata

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 * Select	Agreement Number ?
Unifier Integration ID	PO Number
Requisition Number	PO Issued Date
Requisition Date	Requestor for EBS
Creator for EBS	Date Validation 0
Sent via Integration? - ADMIN ONLY 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

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
-----	-------------	----------	-----------	-----------	-------------------

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

Creating HRSD Contracts – Required Metadata

Create New HRSD Contracts..

Send Save

General **Cost Items**

Add Actions

No.	Line Number	EBS Task	Cost Code	Code Name	Short Description
001	1	Construction WIP	94135	CONSTRUCTION MAT...	CONSTRUCTION MATERI

Line Item Details

General

EBS Task

Select

Cost Code *

Type CBS Code or Name...

Code Name

Short Description *

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

0

Unit Cost

\$0.00

Dollar Amount

\$0.00

Total: 1

Total Amount : \$125.00

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 a dropdown menu for "EBS Task". 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. A red box highlights the "EBS Task" dropdown and the "Design WIP" option in 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
 - Mismatches will be rejected by interface
 - Unfortunately, selections cannot be enforced by the system

General **Cost Items** Change Orders

View Currency Transaction Currency

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



Transaction Details – Important!

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

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	5	Dollar Amount ?	\$0.00
Unit Cost	\$1,200.00		

Total Contract Value

Amount	\$6,000.00
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2. Dollar Amount – Used for Services

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		Dollar Amount ?	\$20,000.00
Unit Cost			

Total Contract Value

Amount	\$20,000.00
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Send for Approval, Send to Interface

- PM send for approval:

This screenshot shows the 'Workflow Action Details' dialog box. The 'Workflow Actions' dropdown is set to 'Send for Chief Review', and the 'Send For' field is set to 'Chief Review'. A red box highlights these two fields. The 'To' field is empty with the placeholder text 'Start typing for suggestions...'. In the background, the 'Send' button is also highlighted with a red box.

- Chief send to interface:

This screenshot shows the 'Workflow Action Details' dialog box. The 'Workflow Actions' dropdown is set to 'Approve', and the 'Send For' field is set to 'I01 Int Hold (Req)'. A red box highlights these two fields. The 'To' field contains the text 'Enstoa HRSD;HRSD Administrator;Lisa Matthews;Stefanie Crowell;Project Administrators'. In the background, the 'Send' button is also highlighted with a red box.

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 I02 Int Hold (PO) 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	

- Retainage is initiated in EBS
- Can be viewed in Unifier cost sheet

Cost Sheet 

View: Default      Currency : United States Dollar (USD)

	WBS Code	WBS Item	Budget	Risks and Trends	Estimate to Complete	Pending Commit Payments	Actual Commit Payments	Retainage	Misc. Actuals
60	93120	BID SUPPORT	(7.75)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
61	93130	PC-PERMIT APPLICAT...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
62	97100	PRE CONSTRUCTION...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
63	97110	PRE CONSTRUCTION...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
64	97120	PRE CONSTRUCTION...	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00
65	97130	PRE CONSTRUCTION...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
66	97140	PRE CONSTRUCTION...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
67	 50.94000	CONSTRUCTION	(4.58)	\$0.00	\$12,000,000.00	\$17,658.00	\$1,073,763.33	(\$10.00)	\$1,039,829.45
68	94105	CONSTRUCTION BUD...	\$0.00	\$0.00	\$12,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00
69	94110	CONSTRUCTION PRO...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
70	94120	CONSTRUCTION CON...	(9.20)	\$0.00	\$0.00	\$10,010.00	\$8,234.00	(\$10.00)	\$50,207.86
71	94125	CONSTRUCTION EQU...	(0.07)	\$0.00	\$0.00	\$5,100.00	\$3,000.00	\$0.00	\$138,797.07
72	94130	CONST EQUIP RENTAL	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Finalize Attachments

- Contract Specialist or Procurement Specialist task
 - Upload final copies of attachments
 - Send for Engineer Notification

The screenshot displays the HRSD Contracts.. interface. At the top right, there are buttons for 'Accept' (highlighted with a red box), 'Decline', and a menu icon. Below this, there are buttons for 'Send' (highlighted with a red box) and 'Save', along with another menu icon. The main content area is divided into two panes. The left pane shows the 'General' tab with fields for 'Title' (Requisition for Engineer...), 'Record Number' (HRC-000004), and 'Due Date'. The right pane shows the 'Attachments' tab with a table of 'Unpublished Attachments'. The table has columns for 'Name', 'Title', and 'Pub. No.'. Two attachments are listed: 'Professional Service Agr...' and 'Scope of Work.pdf', both with checked boxes in the first column. A red box highlights the 'Unpublished Attachments' table. A 'Workflow Action Details' dialog box is overlaid on the left pane, showing 'Action Details' with 'Workflow Actions' set to 'Send For Engineer Notification' and 'Send For' set to 'Engineer Notification'. The 'To' field contains 'Willy Wonka'. Below this, there are 'Due Date Details' with a 'Task Due Date' field. At the bottom of the dialog, there is an information icon and the text 'Task Due Date is not available', along with 'Cancel' and 'Send' buttons.

Engineer Notification

- 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 HRSD Contract Workflow Action Details and Workflow Progress. The Workflow Action Details window shows a dropdown menu for 'Workflow Actions' with options: 'Select', 'Send for Contractor Notification', and 'Accept and Close'. The Workflow Progress window shows a table of steps with columns: Step Name, Assignee, Company, and Status.

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

Contractor Notification

- Contractor awarded the PO will be notified and be able to view final attachments
- Workflow
 - Accept and Close for record to reach final (end) 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 has tabs for "General", "Cost Items", and "Change Orders". The "General" tab is active, showing 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 modal window titled "Workflow Action Details" is open in the center. It contains the following information:

- Action Details**
- Workflow Actions**: A dropdown menu with "Accept and Close" selected.
- Send For**: A text field containing "End".

Below the modal, a table of attachments is visible, including "Professional Service Agr..." and "Scope of Work.pdf".

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

The screenshot shows the 'General' tab of a contract record. The title is 'Requisition for Engineering Services' and the creator is 'Stefanie Crowell'. The record number is 'HRC-000004' and the creation date is '04/30/2020 07:58 AM (UTC-5)'. The 'Attachments' tab is active, showing a list of attachments including 'Professional Service Agr...' and 'Scope of Work.pdf'. A dropdown menu is open over the 'SOV' attachment, showing options like 'Cash Flow', 'SOV', 'CC more users...', 'Email as Attachment', 'Print', and 'Review'.

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

uhrsd-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	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$15,000.00	\$0.00
0020	2	DESIGN AGREEMENT	\$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

uhrsd-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

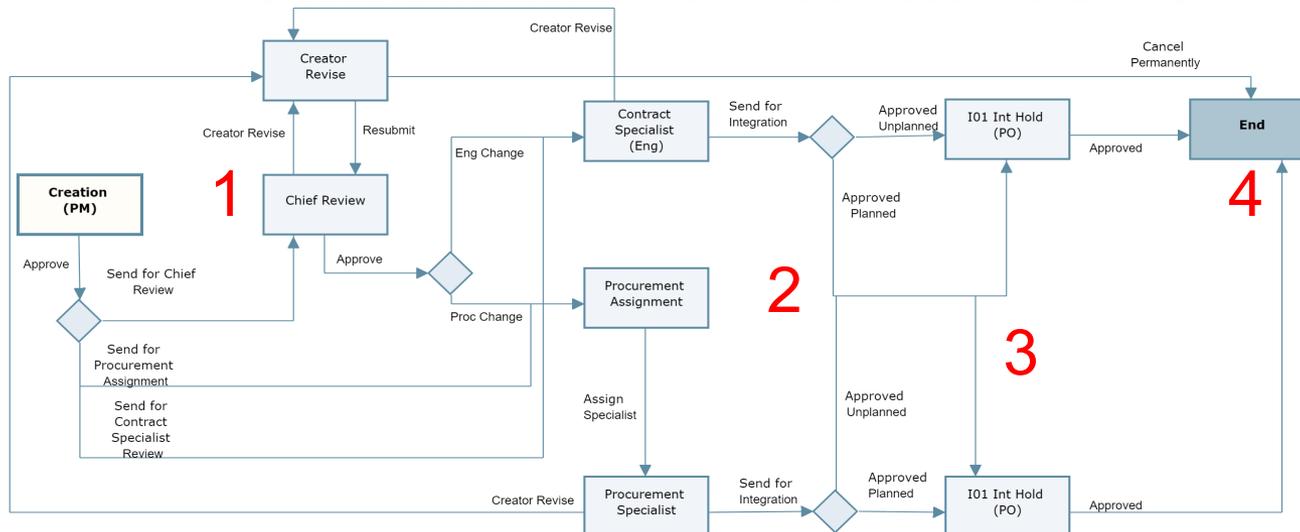


HRSD Contract Change Project Manager Initiated



HRSD Contract Change Business Process (BP)

- Used by Project Managers to initiate Amendments and 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

Reference Commit *

Should Construction Contractor be able to View approved record?

Select

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

Vendor Number

Integration Information

Sent via Integration? - ADMIN ONLY

No

Justification

Contract Type

Select

Planned or Unplanned? * ?

Select

Change Category

Select

Has the corresponding risk item been resolved? ?

Select

Reason for Change

Analysis of Reconn

Justification

Contract Type

Lump Sum

Planned or Unplanned? * ?

Unplanned Amendment

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.A WELL AND 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: [Blank]

Agreement Number: [Blank]

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: [Blank]

Agreement Number: [Blank]

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 / PO Type ?

Agreement Number ?

Used to reference a blanket 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

General

Title *

Record Number

Due Date
MM/DD/YYYY HH:MM AM

Amount \$0.00

Creator
Stefanie Crowell

Creation Date

Status

Account Number

Attachments | Comments | Linked Records | Linked Mail

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 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 Description

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) ?
[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)
 - Directs to the subset of expenditure types that can be selected

Create New HRSD Contract Change.. Send Save

General Cost Items

Add Actions

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

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
Design WIP

Select

- PrePlanning WIP
- PrePlanning Land
- PrePlanning Non-WIP
- PER WIP
- PER Land
- PER Non-WIP
- Design WIP



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..

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 *
Approve

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-00004

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

HRSD Contract Change.. Accept Decline

General Cost Items

Impact Day Type

Cost Impact Notes

Schedule Impact Notes

Vendor Information

Vendor Name Vendor Number

ZZ Test Supplier 103020

Contractor Notification

Contractor Notification Creator

Integration Information

Sent via Integration? - ADMIN ONLY

No

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

Workflow Progress View Graphic...

Title Change Order 2 **Record Number** HCO-000004 **Current Step** I01 Int Hold (PO) **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	Approve	05/08/2020 08:22 AM (UTC-5)
Contract Specialis...	Stefanie Crowell	HRSD	Completed	Send for Integration	05/08/2020 08:39 AM (UTC-5)
I01 Int Hold (PO)	Lisa Matthews	HRSD	Not Started		
I01 Int Hold (PO)	Stefanie Crowell	HRSD	Not Started		
I01 Int Hold (PO)	Enstoa HRSD	HRSD	Not Started		
I01 Int Hold (PO)	HRSD Administrator	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

Impact Day Type

Cost Impact Notes

Schedule Impact Notes

Vendor Information

Vendor Name CH2M HILL ENGINEERS INC

Vendor Number 100870

Contractor Notification

Contractor Notification Creator CN-00006

Integration Information

Sent via Integration? - ADMIN ONLY

Yes

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

Workflow Progress

View Graphic...

Title Change 6

Record Number HCO-000006

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	05/06/2020 02:09 PM (UTC-5)
Contract Specialis...	Enstoa HRSD	HRSD	Completed	Send for Integration	05/06/2020 02:09 PM (UTC-5)
I01 Int Hold (PO)	Enstoa HRSD	HRSD	Completed	Approved	05/06/2020 02:10 PM (UTC-5)

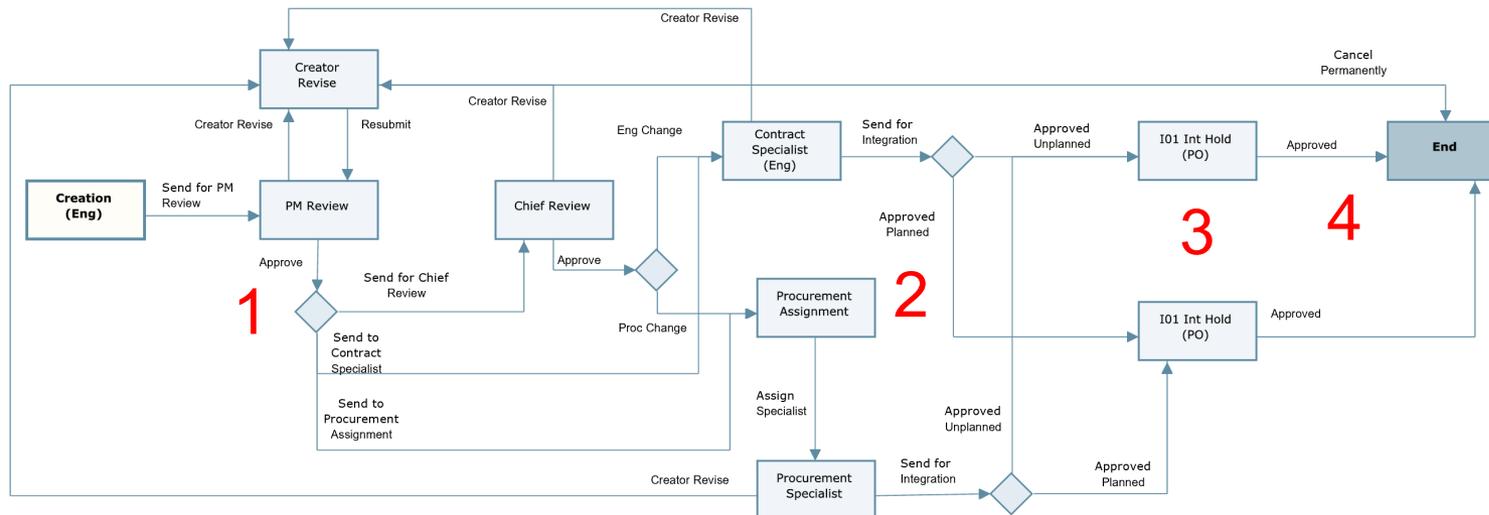


HRSD Contract Change BP Engineer Initiated



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



- Engineer sends record for Project Manager Review

The screenshot displays the 'Workflow Action Details' window in the HRSD software. The window is divided into several sections:

- Action Details:** A red box highlights the 'Workflow Actions' dropdown menu, which is set to 'Send for PM Review'. To its right, the 'Send For' field is set to 'PM Review'.
- To:** The recipient list includes 'HRSD Administrator;Stefanie Crowell;Project Managers'.
- Due Date Details:** The 'Task Due Date' field is empty, and a message at the bottom states 'Task Due Date is not available'.

In the background, the 'Create New HRSD Contract' form is visible, showing fields for Title, Record Number, Due Date, Amount, and Start Date. The 'Send' button in the top right corner of the workflow window is also highlighted with a red box.



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 *
Approve

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

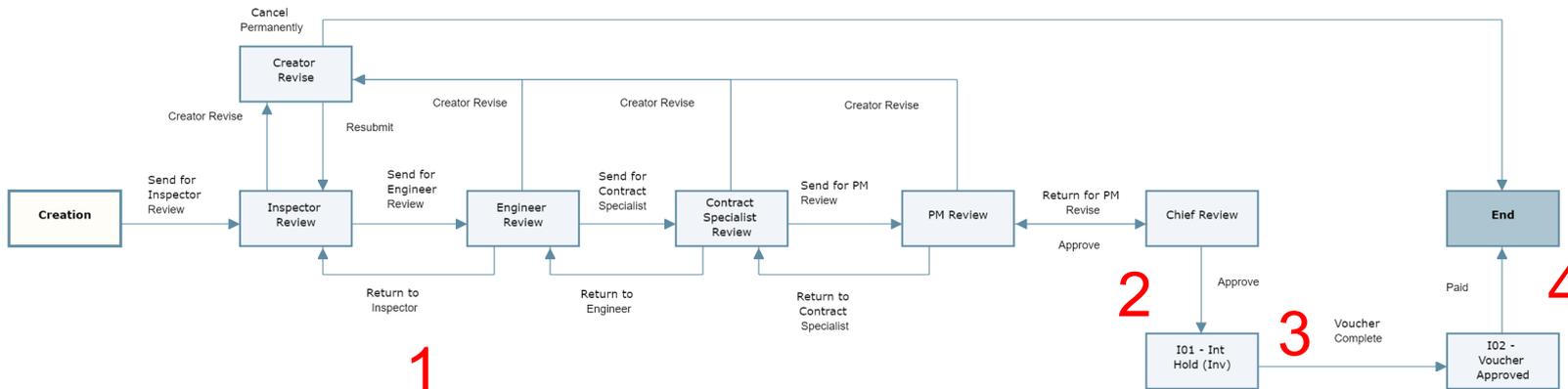


HRSD Payments Contractor Initiated



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 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 home icon and a list of menu items: 'Company Work...', '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 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 (delete, refresh, print, search, etc.). Below the utility icons is a table header with columns: 'PO Number', 'Title', 'Record Number', 'Invoice Number', and 'Invoice Date'. The table body is currently empty.

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

Test Contractor

Creation Date

Status

Amount

Total Amount

0.00

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: 39

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



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

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
-----	-----------	-----------

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

General 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
--------	------------

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



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.

Workflow – Post Creation

- Inspector > Engineer > Contract Specialist > PM > Chief > ERP Interface

HRSD Payments..

Accept Decline

Payment Voucher Requested Disbursement

Vendor Info

Reference Commit HRC-000009	PO Number 6201517
Vendor Name ZZ Test Supplier	Vendor Number 103020

Comments

Description

Payment Information

Check No.	Actual Payment Date
Check Amount \$0.00	Sent via Integration? Yes

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

Workflow Progress View Graphic...

Title Invoice	Record Number HPA-000002	Current Step I01 - Int Hold (Inv)	BP Setup Used Contractor Enters (Integration...
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Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Test Contractor	ZZ Test Supplier	Completed	Send for Inspecto...	05/04/2020 11:22 AM (UTC-5)
Inspector Review	Stefanie Crowell	HRSD	Completed	Send for Engineer...	05/04/2020 11:41 AM (UTC-5)
Engineer Review	Willy Wonka	HRSD	Completed	Send for Contract ...	05/04/2020 11:48 AM (UTC-5)
Contract Specialis...	Stefanie Crowell	HRSD	Completed	Send for PM Review	05/04/2020 11:49 AM (UTC-5)
PM Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 11:50 AM (UTC-5)
Chief Review	Stefanie Crowell	HRSD	Completed	Approve	05/04/2020 11:52 AM (UTC-5)
I01 - Int Hold (Inv)	HRSD Administrator	HRSD	Not Started		
I01 - Int Hold (Inv)	Enstoa HRSD	HRSD	Not Started		
I01 - Int Hold (Inv)	Lisa Matthews	HRSD	Not Started		

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

Vendor Info

Reference Commit HRC-000018	PO Number 6201525
Vendor Name CH2M HILL ENGINEERS INC	Vendor Number 100870

Comments

Description

Payment Information

Check No. 4029306	Actual Payment Date 05/05/2020
Check Amount \$9,500.00	Sent via Integration? Yes

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

Workflow Progress

View Graphic...

Title: Retainage 05 05 20 - 02
Record Number: HPA-000009
Current Step: End
BP Setup Used: Contractor Enters (Integration...)

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Creation	Enstoa HRSD	HRSD	Completed	Send for Inspector Review	05/05/2020 10:22 AM (UTC-5)
Inspector Review	Donna Stinson	HRSD	Completed	Send for Engineer Review	05/05/2020 10:23 AM (UTC-5)
Engineer Review	Donna Stinson	HRSD	Completed	Send for Contract Specialist	05/05/2020 10:23 AM (UTC-5)
Contract Specialis...	Donna Stinson	HRSD	Completed	Send for PM Review	05/05/2020 10:24 AM (UTC-5)
PM Review	Donna Stinson	HRSD	Completed	Approve	05/05/2020 10:24 AM (UTC-5)
Chief Review	Donna Stinson	HRSD	Completed	Approve	05/05/2020 10:25 AM (UTC-5)
I01 - Int Hold (Inv)	HRSD Administrator	HRSD	Completed	Voucher Complete	05/05/2020 10:50 AM (UTC-5)
I02 - Voucher App...	HRSD Administrator	HRSD	Completed	Paid	05/05/2020 10:59 AM (UTC-5)



Risk Management

- Cost based Risk Management
- Allows for project cost forecast to reflect known risks
- Approval will route through a Chief prior to adjusting the cost forecast
- Full risk can be realized, or partial
- Records can be modified as project progresses, and risks are realized or mitigated



Create a Risk Record - Metadata

- Cost Manager>Risks>Create

Create New Risks

Risk Cost Line Item

Title

Record Number

Creator
HRSD Administrator

Creation Date

Record Last Update Date

Status

Description

Risk Details

Likelihood
Select

Change Request Required?
Select

Scope Change?
Select

Legal Review Required?
Select

Consequence
Select

Forecasted Resolution Date
MM/DD/YYYY HH:MM AM

Schedule Change Required?
Select

Schedule Impact (days)
0

Resolution Mitigation Plan

Assigned To
Type a User Name...

Action To Resolve



Create a Risk Record – Line Item

- Cost Line Item>Add

Create New Risks

Send Save

Risk **Cost Line Item**

Add Actions

No.	WBS Code	Code Name	Short Description	Amount
-----	----------	-----------	-------------------	--------

Line Item Details

General

If you add a cost line to this risk, your project cost sheet forecast will increase by the amount of this line. The Cost Sheet Impact dropdown can be used to reduce the amount the forecast is increased, while still maintaining the full risk amount in this BP

Cost Code *

Code Name

Short Description *

Risk Amount * ?

Cost Sheet (forecast) Impact of Cost * ?

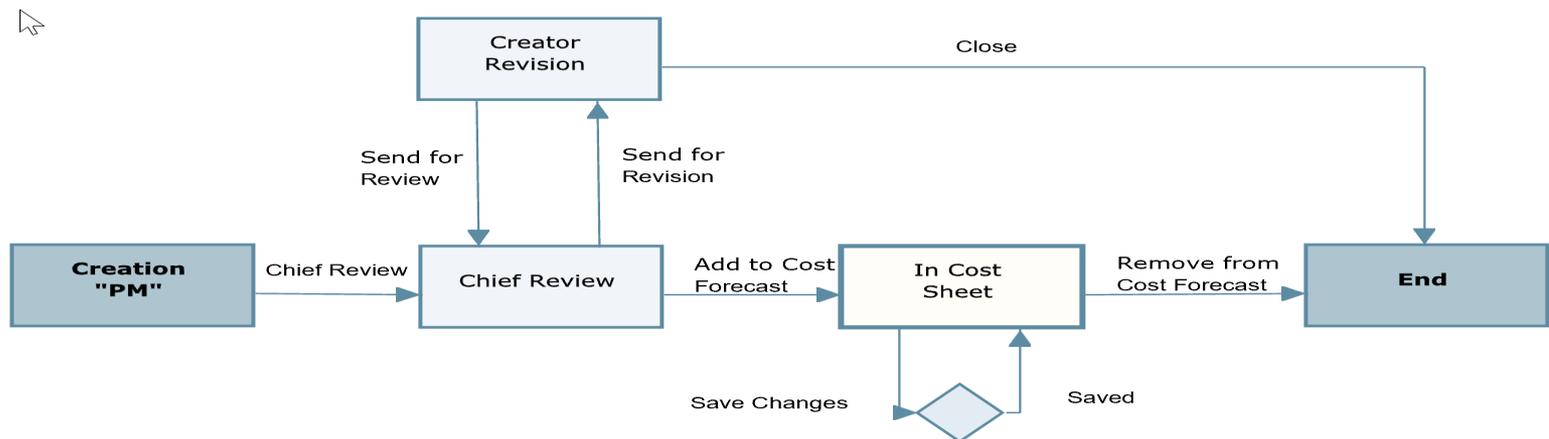
0%
30%
50%
80%
100%

Risk Record Approval – Chief Group

- Accept>Send>Add to Cost Forecast>Send

The screenshot shows a 'Workflow Action Details' window with the following elements:

- Action Details:**
 - Workflow Actions:** A dropdown menu with 'Add to Cost Forecast' selected.
 - Send For:** A text field containing 'In Cost Sheet'.
 - To:** A text input field with the placeholder text 'Start typing for suggestions...'.
- Due Date Details:**
 - Task Due Date:** An empty text field.





- Sort to show Higher Risk Items

Capital Projects > Example Pipeline...

Risks

+ Create Actions View (Modified) All Records [X] [Refresh] [Print] [Search] [Comments] [Help]

Record Number	Title	Status	Likelihood	Conseque...	Assigned To	Forecasted Resolution Date	Record Last Update Date
RSK-000001	Subsurface Utility Risk	In_Cost_Sheet	High	Low	HRSD Administrator	04/30/2020 05:00 PM	04/27/2020 04:14 PM
RSK-000002	Condition Assessment ...	In_Cost_Sheet	Medium	Medium	HRSD Administrator	05/31/2020 05:00 PM	04/27/2020 04:27 PM

Cost Sheet Summary - Risks

Cost Sheet

Cost Sheet

Currency : United States Dollar (USD)

	WBS Code	WBS Item	Project Cost	Uncommitted Budget	Risks and Trends	Estimate Compl
93	94120	CONSTRUCTION CON...	00	\$0.00	\$70,000.00	
94	94125	CONSTRUCTION EQU...	00	\$0.00	\$0.00	
95	94130	CONST EQUIP RENTAL	00	\$0.00	\$0.00	
96	94135	CONSTRUCTION MAT...	00	\$0.00	\$0.00	
97	94155	CONSTRUCTION TES...	00	\$0.00	\$0.00	
98	94170	CONST UTIL RELOCA...	00	\$0.00	\$0.00	

Transactions

Group By	Title	Work Package	Description	Amount
1 002	Condition Assessment may res		CONSTRUCTION CONTRACTS	\$50,000.00
2 001	Subsurface Utility Risk		CONSTRUCTION CONTRACTS	\$20,000.00

Project Forecast

- As more information is known about the risks, the risk records should be updated
- The risk records can be modified, without having to go back through approval
- Changes will affect the cost forecast

Last Step – Resolve the Risk

- Over time risk will be realized (Change Order) or mitigated, avoided, transferred, etc.
- Either of the above circumstances should result in the risk record being resolved
 - Be careful not to “double count”
- Accept>Send>Remove from Cost Forecast>Send

Workflow Action Details

▲ Action Details

Workflow Actions *
Remove from Cost Forecast

Send For
End

- 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

