

2016



# [UNIFIER USER MANUAL]

This manual is intended to provide HRSD commissioned Engineers and Contractors guidance on using the Unifier Enterprise Project Management System

# UNIFIER USER MANUAL

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# UNIFIER USER MANUAL

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## INTRODUCTION

Oracle's Primavera Unifier provides the means to optimize HRSD business processes and allows transparency to enable customers better management of all the information required to successfully manage a project.

Managing projects from design through completion of construction as well as regular maintenance requires extensive collaboration between numerous, often a variety of diverse, disciplines and jurisdictions. Ensuring accurate and current information for a project is essential for the successful completion of any project.

## **PRIMAVERA UNIFIER™**

Unifier is a system for managing the flow of information in projects, providing a seamlessly automated and integrated environment across the lifecycle of your company's facilities, from planning, design, procurement, construction, and into operations and maintenance. It provides real-time visibility across multiple projects to help your company make fast, accurate decisions. Unifier lets you track and manage information such as budgets, project members, specifications, requests for information, and shared documents. You decide who has access to the information, which team members are allowed to approve changes to the information, and how information flows between people.

Oracle's solutions automate manual processes and pull together information from various point systems typically used on a portfolio of projects. Through Unifier, executives and project team members can better manage all data and business processes in one centralized system, while reducing the reliance on older technologies such as email, fax, and desktop applications.

Unifier was designed from the ground up specifically for the facility owner, based upon our industry domain expertise and knowledge of best practices combined with direct customer input gathered over decades of client interaction. The result is a robust set of capabilities with an intuitive, easy-to-use interface. Unifier enables leading owners and operators to increase enterprise efficiencies reduce project and operating costs, enhance visibility, and improve time-to-market.

# UNIFIER USER MANUAL

## LOGIN

Access to Unifier is located at <https://uhrsd-unifier.oracleindustry.com>

User names and temporary password will be provided by the Unifier Administrator. Contact your project manager or the Unifier Administrator ([unifieradmin@hrsd.com](mailto:unifieradmin@hrsd.com)) to schedule a training session.

### Initial Log In

It is highly recommended that, prior to logging into Unifier for the first time, each user reviews the table below regarding compatibility between internet browsers and Java. As of April 15, 2016, the recommended Java version is Java 8.73 32-bit.

Please note that, as of September 1, 2015, Google Chrome no longer supports the Java plug-in (click [here](#) for additional information).

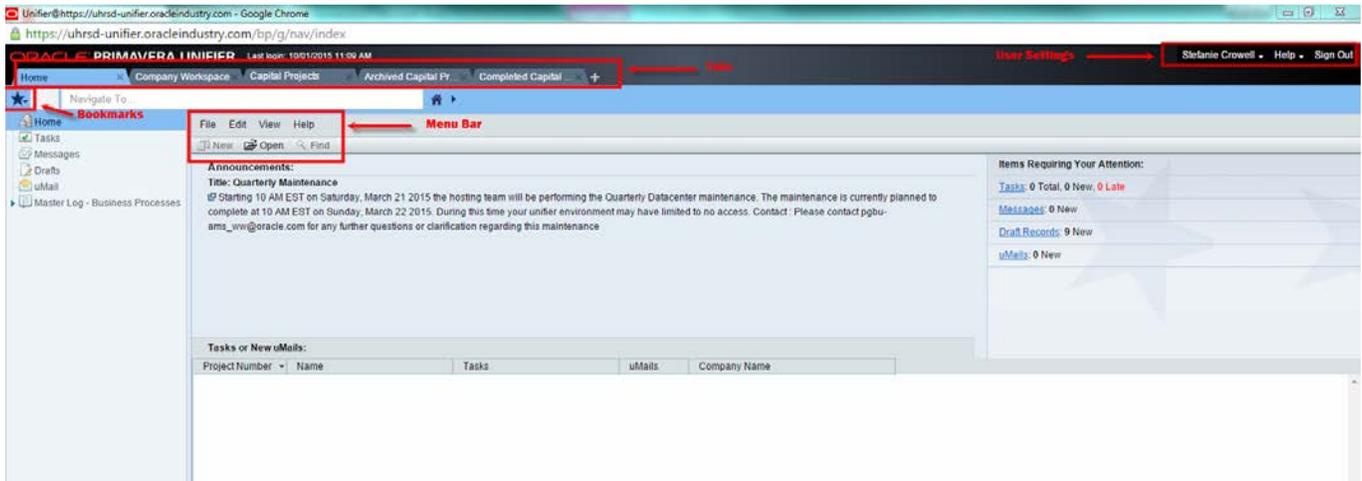
Oracle Primavera Unifier Release v10.1 (10.1.0.0) Tested Configurations					Last Updated: April 01, 2016
Client and Browser Information					
This document covers the tested configurations for Primavera Unifier					
Note: JRE versions certified with base Unifier version and subsequent patch sets listed in this document continue to be supported with the latest patch sets unless there is any exception mentioned. To use the latest JRE, make sure you use the patch set that is certified for that JRE.					
Version Supported	Client OS / Email Clients	Client OS 32/64 bit	Supported Browsers	JRE Vendor Version	Exceptions and Additional Information
<b>Unifier 10.1.0.0 Patch Set 16; Patch # 22613972</b>					
10.1.16.0	Windows 10 Windows Vista Windows 7 Windows 8	32 bit	Internet Explorer 11.x Internet Explorer 9.x Firefox 38.6 (ESR)	1.8.0_71	Recommendation is to use the latest version. JRE is used in Intermediate File Upload, Advanced File Upload and Autovue.
10.1.16.0	Windows 10 Windows Vista Windows 7 Windows 8	64 bit	Internet Explorer 11.x Internet Explorer 9.x Firefox 38.6 (ESR)	1.8.0_71	Recommendation is to use the latest version. JRE is used in Intermediate File Upload, Advanced File Upload and Autovue.
10.1.16.0	Mac OS X 10.11.2 (El Capitan)	64 bit	Safari 9.0	1.8.0_71	Recommendation is to use the latest version. JRE is used in Intermediate File Upload and Autovue. Advanced document upload is not supported on Mac OS.
<b>Base Unifier 10.1.0.0</b>					
10.1.0.0	Windows Vista Windows 7 Windows 8	32 bit	Internet Explorer 9.x Internet Explorer 10.x Internet Explorer 11.x Firefox 31 (ESR) Chrome 37.x	1.7.0_67 1.8.0_20	Recommendation is to use the latest version. JRE is used with Intermediate or Advanced File Transfer option.
10.1.0.0	Windows Vista Windows 7 Windows 8	64 bit	Internet Explorer 9.x Internet Explorer 10.x Internet Explorer 11.x Firefox 31 (ESR) Chrome 37.x	1.7.0_67 1.8.0_20	Recommendation is to use the latest version. JRE is used with Intermediate or Advanced File Transfer option.
10.1.0.0	Mac OS X 10.9.1 (Mavericks)	64 bit	Safari 7.0.3	1.7.0_67 for Mac OS X 10.9.1 (Mavericks)	Recommendation is to use the latest version Advanced document upload is not supported on Mac OS.
10.1.0.0	iOS 7.0.2 (iPad)	n/a	Safari 7.x	n/a	1. Apple doesn't provide native support for Java on iOS (iPhone or iPad). 2. Unifier is not supported natively on iOS (Java required).

Once users log in with their temporary password, they will be required to change their password and set security questions.

# UNIFIER USER MANUAL

## NAVIGATION

Unifier employs a tab based navigation system. The initial log in will bring the user to the Home tab. Individual user permissions and user preferences will alter the amount of information that each user can view.

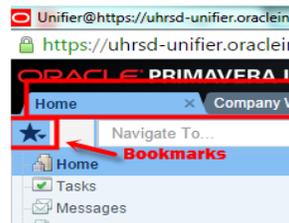


## USER SETTINGS

There are a limited amount of user preferences that can be used to configure Unifier for the individual user.

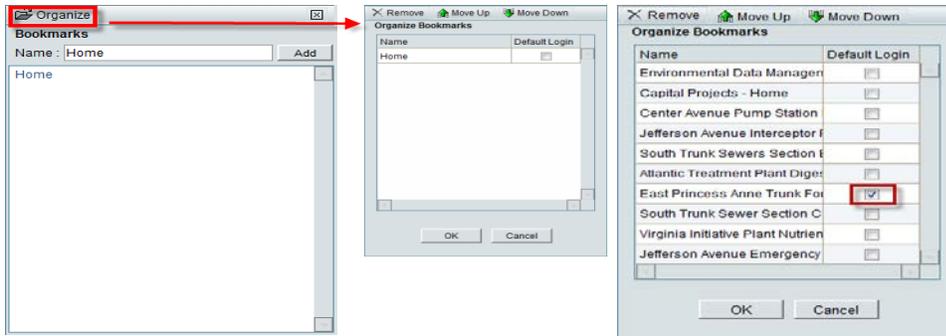
### Bookmarks

Each location throughout Unifier can be recorded as an individual page by clicking on Bookmark (the star in the upper-left corner).



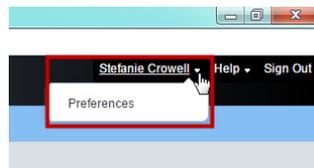
- Type in a name for the bookmark then click Add to create a bookmark
- Bookmarks can be organized by renaming them or moving them up or down
- Bookmarks can be used to direct which page is the default log in view

# UNIFIER USER MANUAL

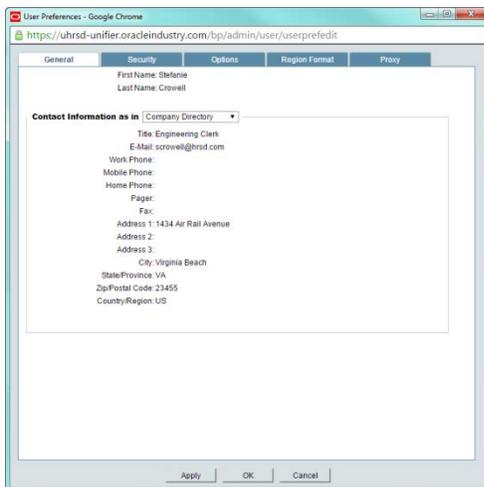


## Preferences

The preferences menu has several tabs for individual user settings and can be accessed by clicking on the user's name in the upper-right corner



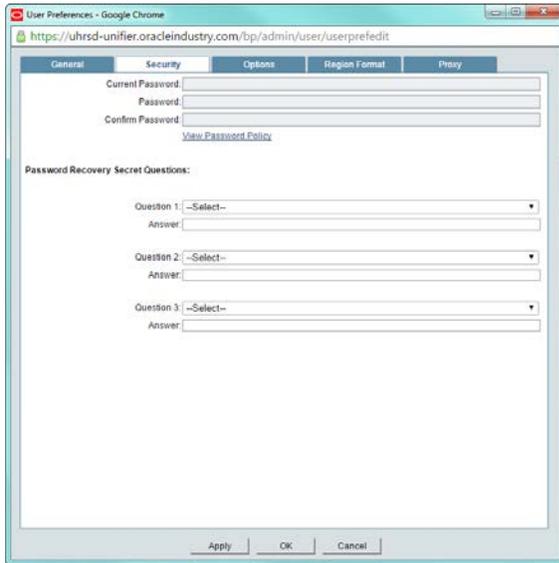
## General



-This tab contains all the contact information for the specific user logged into Unifier.

-Submit any updates to contact information to the Unifier Administrator

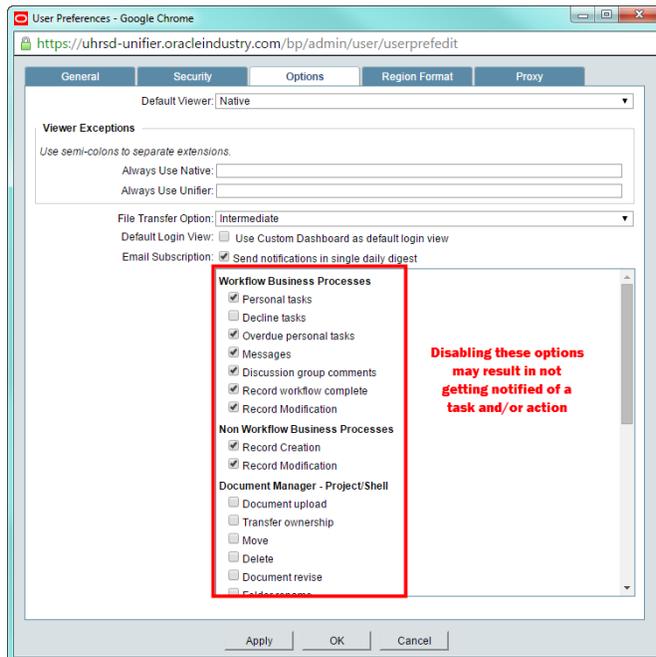
## Security



User passwords can be changed by logging into <https://uhrsd-unifier-idm.oracleindustry.com/oim> or contacting the Unifier Administrator.

Security questions to recover user passwords can be edited in this tab.

## Options



### Default Viewer

Default viewer can be Native or Unifier Viewer

- Native viewer uses programs installed on user's computer to view files.
- Unifier viewer allows user to view files of any file type even if that program is not installed (functionality is limited)

### File Transfer Option

Basic – allows for attachment of one document at a time

Intermediate – allows for selection of multiple documents to attach\*

Advanced – allows for drag and drop of documents into Unifier\*

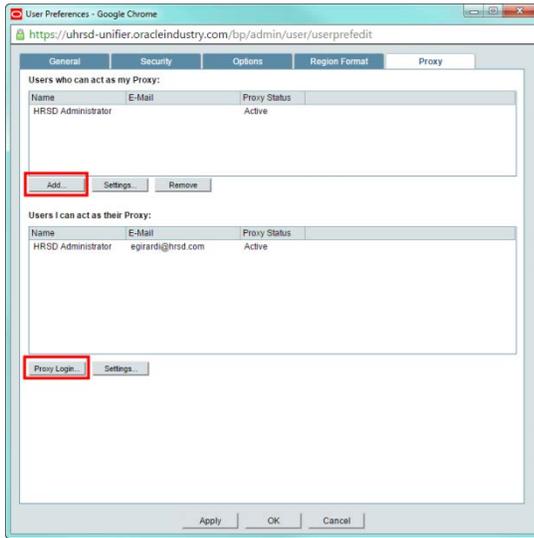
\*An additional Java plug in must be downloaded for this option to function (See Help/Download Plugins)

### Notifications

Users can use checkboxes to decide which tasks send a notification to user's email account.

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## Proxy



Setting proxies allow other Unifier users to take action on tasks assigned to another Unifier user.

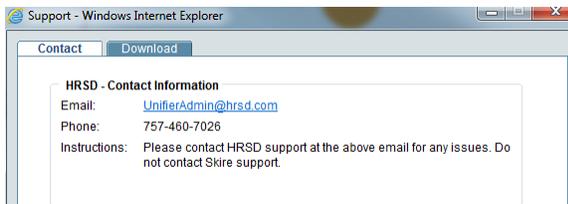
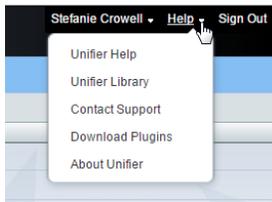
Add: Select other Unifier licensed user  
Set Start and End Date/Time

Proxy Login: Select user name and click Proxy Login. The window will refresh and will read “Your name on behalf of other user.”

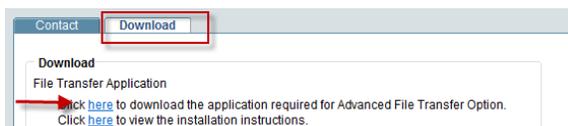
## Help



Select the dropdown menu next to Help to access support options.



Contact Support – Contact information for Unifier Administrator

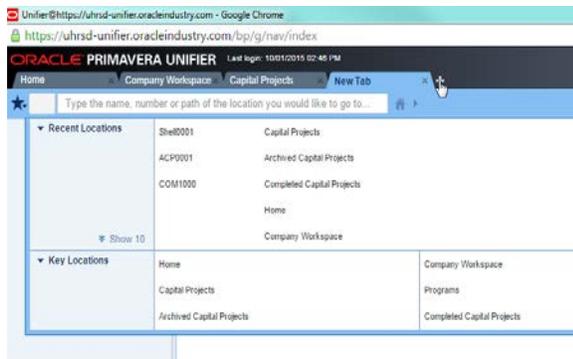


Download Plugins – Link to download Java plug in need for Advance File Transfer Option. To install, click on the link and follow the instructions to Run the Install setup. See Appendix B for detailed instructions.

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## TABS

There are multiple ways to navigate through projects in Unifier.



Home Overall summary of all:

- Oracle issued announcements
- Tasks requiring attention

Company Workspace HRSD specific activities

- Company Business processes
- Unifier Administration

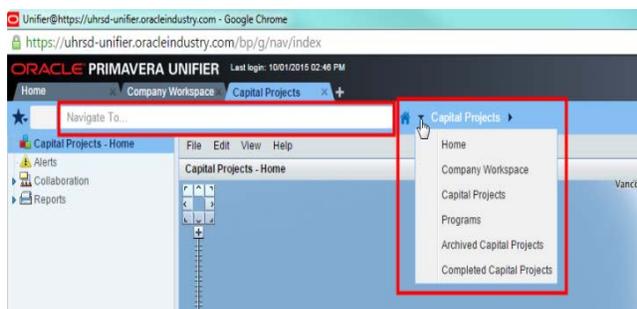
Capital Projects/Archived Capital Projects/Completed Capital Projects\* Project Level

- BPs and Document manager
- Cost and Schedule sheet

Selecting the plus (+) sign will allow users to open additional tabs and select between Recent Locations and Key Locations. Users can add as many tabs as needed (i.e. one for each project assigned).

Tabs will remain active after logging out and will continue to stay active until closed (X) out. When navigating between tabs, the last location visited will still be available.

\*Please note that the Archived Capital Projects and Completed Capital Projects tabs were created April 22, 2015. Users that were granted permissions prior to this date are able to access the projects in these tabs.



“Navigate to” Search for projects in the “Navigate to” field located on the upper left. Previous locations will be shown in a dropdown menu when you click in the field.

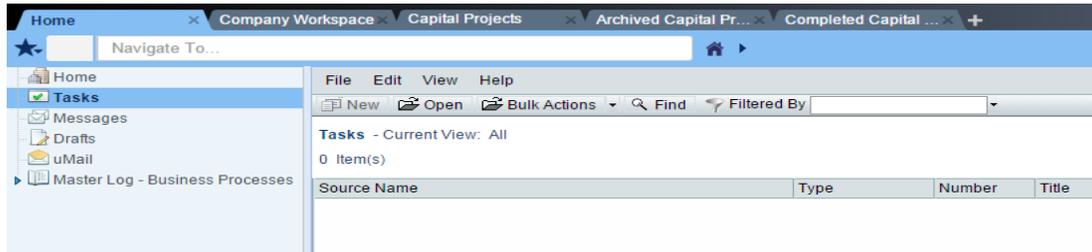
“Breadcrumbs” Users can click on the arrow next to a listed page and view options available.

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## Home Tab

User can access all assigned tasks throughout Unifier in this single summarized tab.

## Tasks



This shows all the work the logged in user must take action on. It includes all the tasks assigned and/or accepted by the user across all projects the user is a member of.

## Company Workspace Tab

The Company Workspace Tab is primarily used for HRSD administration of the Unifier program. Only two company-level business processes are initiated from the company workspace tab: Project Requests and Vendors.



Immediate access to Unifier Administrator email, the HRSD webpage, and the user Reference Manual is provided.

## Reports

Company level reports can be accessed from the Company Workspace tab. Specific permissions will need to be granted for access to each report.

## Capital Projects (including Archived and Completed) Tab

Each individual project can be accessed separately and more thoroughly via the Capital Projects tabs.

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Capital Projects – Contains current, proposed, and warranty projects prior to completion.

Archived Projects – As of May 4, 2015, any projects that were available in the Capital Projects tab were copied over to the Archived Projects tab. The archived versions of the projects were made in order to be compatible with the E-Business Suite (EBS) due to our new accounting structure. The archived version of these projects will only be used to reference records that were entered prior to the switchover (historical).

Completed Project – Contains projects that have closed out and are complete per Accounting.

The screenshot shows the HRSD Unifier web application interface. At the top, there is a navigation bar with tabs for 'Home', 'Company Workspace', 'Capital Projects', 'Archived Capital Projects', and 'Completed Capital Projects'. The 'Capital Projects' tab is active. Below the navigation bar, there is a header area with the HRSD logo and the tagline 'Cleaning wastewater every day for a better Bay.' To the right of the header, there is a 'Items Requiring Your Attention' section with counts for Tasks, Messages, Draft Records, and sMails. Below this, there is a 'Details' section for the selected project, showing fields for Project Number, Project Name, Description, Administrator, Currency, Status, and Email Address. The 'Find' button is highlighted with a red box. Below the details section, there is a 'List of Projects' table with columns for CIP Number, Project Name, Department Contact, System, Project Status, Managing Dept., Project Type, and Project Region. The table contains 241 items, and the current page is 1 of 3.

CIP Number	Project Name	Department Contact	System	Project Status	Managing Dept.	Project Type	Project Region
AB010000	Army Base 24-inch and 20-inch Transmission Main Replace	Katherine Linares	Army Base	Design Delay	Engineering	Pipelines	South Shore
AB010100	Army Base Treatment Plant Improvements - Phase III	Katherine Linares	Army Base	Construction	Engineering	Wastewater Treatment	South Shore
AB010500	Section W Force Main Replacement	Katherine Linares	Army Base	Design Delay	Engineering	Pipelines	South Shore
AB011300	Army Base Treatment Plant Administration Complex	Brian McJamara	Army Base	PER	Operations-Treatment	Facilities and Buildings	South Shore
AB011500	Buckman Avenue Force Main Replacement	Lee Heath	Army Base	Construction	Engineering	Pipelines	South Shore
AD010400	Environmental Data Management System	Stacie Metzler	Administration	Construction	Engineering	Software and Technology	Administrative
AD011200	Operations Center Phase VII	John Swann	Administration	Completed	Engineering	Facilities and Buildings	Administrative
AD011700	Enterprise Resource Management System	Steve de Mik	Construction	Finance	Operations-PPM	Software and Technology	Administrative
AD011800	Central Environmental Laboratory Roof Replacement	Ray Holmes	Administration	Design	Operations-PPM	Facilities and Buildings	Administrative
AD011900	Central Environmental Laboratory HVAC	Tom Morris	Administration	Design	Operations-PPM	Facilities and Buildings	Administrative
AT010710	East Princess Anne Trunk Force Main Reinforcement-Sector	Katherine Linares	Atlantic	Completed	Engineering	Pipelines	South Shore
AT010730	East Princess Anne Trunk Force Main Reinforcement-Sector	John Dano	Atlantic	Completed	Engineering	Pipelines	South Shore
AT011100	Great Bridge Interceptor Force Main Extension Directional	DJ John Dano	Atlantic	Bid Delay	Engineering	Pipelines	South Shore
AT011410	Providence Road Interim Pressure Reducing Station	Tim Marsh	Atlantic	Construction	Engineering	Pump Stations	South Shore
AT011420	Providence Road Pressure Reducing Station Modifications	Sam McAdoo	Atlantic	Proposed	Engineering	Pump Stations	South Shore
AT011510	Shippis Corner Interim Pressure Reducing Station	Katherine Linares	Atlantic	PER	Engineering	Pump Stations	South Shore
AT011520	Shippis Corner Pressure Reducing Station Modifications	Sam McAdoo	Atlantic	Proposed	Engineering	Pump Stations	South Shore

To search for a specific project, click on Find to run a search for CIP Number, Project Name and/or System.

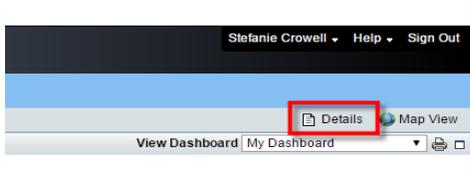
The screenshot shows the 'Find' search form in the HRSD Unifier application. The form has three input fields: 'CIP Number contains', 'Project Name contains', and 'System equals'. There is a 'Select...' button next to the 'System equals' field. At the bottom of the form, there are 'Clear' and 'Search' buttons.

## Project Specific Details

Double clicking on one individual project will provide user with detailed information on the project, summary of actions, and project specific functions.

### Details

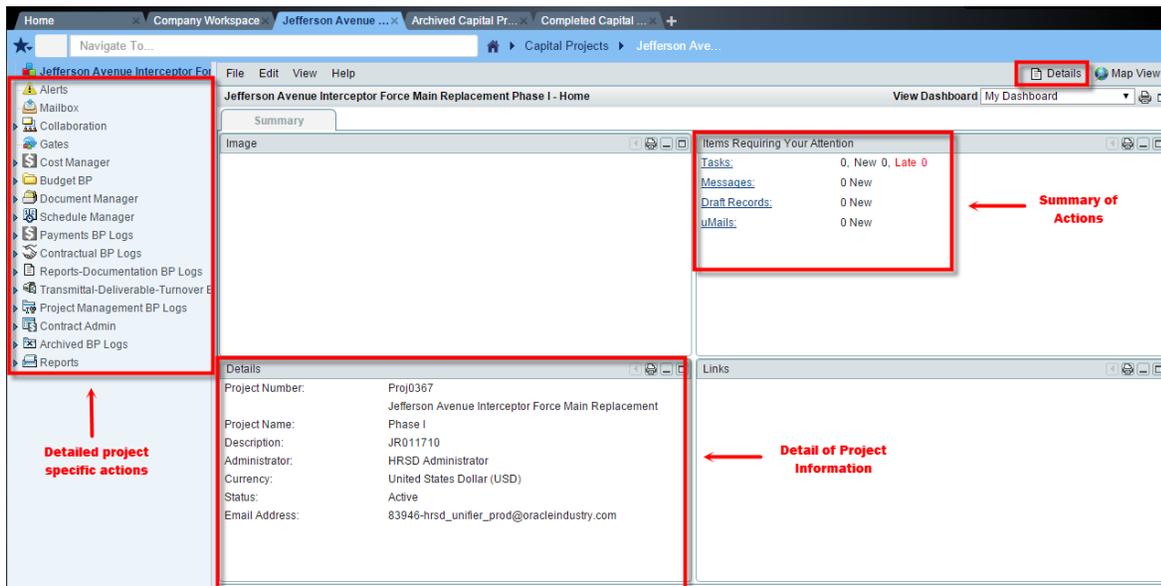
# UNIFIER USER MANUAL



Top right corner of the project page provides you with summary project details:

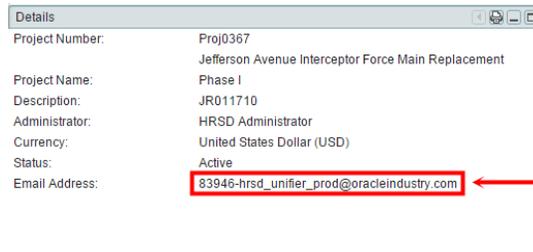
- Project name and CIP number
- Detail information on the project (system, type, status, priority score)
- Project Description and Justification

## Detailed project specific actions



## Project Specific Email Address

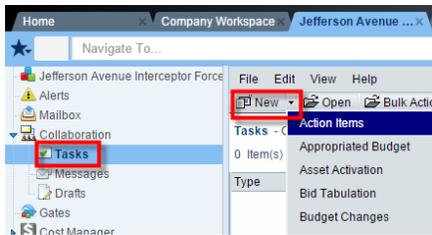
Each project is assigned its own unique email address. Correspondence about each project should use this address so that all documentation is stored for future reference.



## Alerts

An alert will notify the user of an overdue task or custom alerts can be created for notification of project milestones.

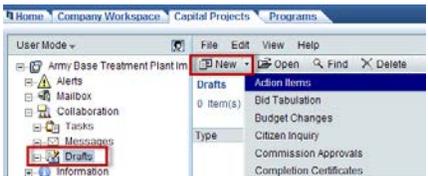
# UNIFIER USER MANUAL



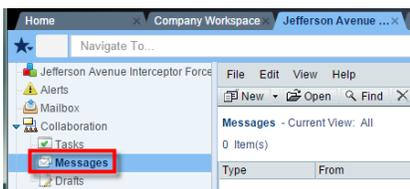
## Mailbox

The mailbox is the repository for all emails sent to the project specific email address.

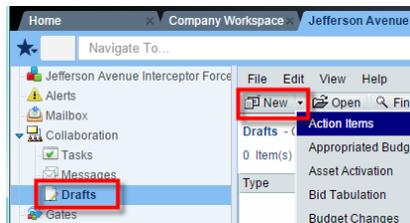
## Collaboration



Tasks – User can create new or take action on business processes from this option.



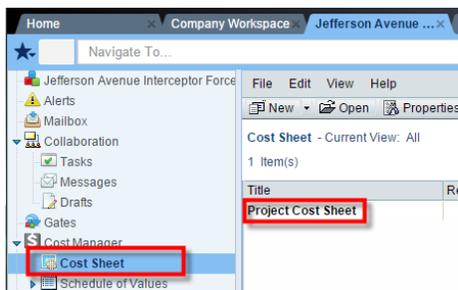
Messages – User can view messages regarding business processes that they were cc'd on.



Drafts – New business processes can be created from this option and will be saved as a draft until sent to another user to take action.

## Cost Manager

Cost Manager provides summary cost information on project budget, encumbrances, and expenditures.



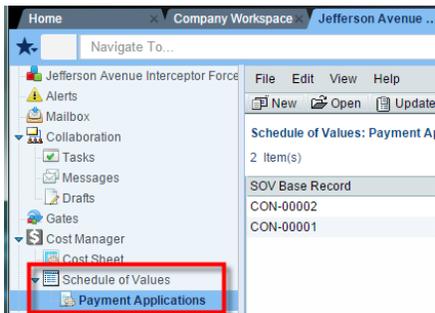
Cost Sheet - Information in the cost sheet is supplied through the E-Business Suite (EBS)-Unifier interface. Access to the cost sheet is permission controlled.

# UNIFIER USER MANUAL

Project Cost Sheet

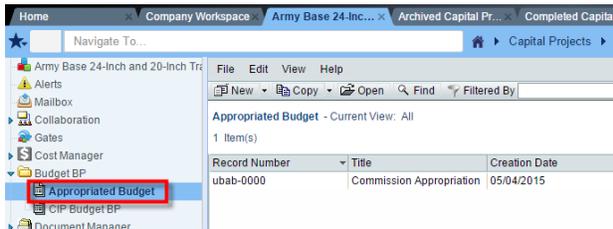
Currency: United States Dollar (USD)

	VBS Code	VBS Item	CIP Budget	Appropriated Budget	Pending Contracts	Approved Contracts	Pending Change Orders	Approved Change Orders	Project Cost	Pln
1	00000	CAPITAL IMPROVEMENTS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
2	10.01000	PRE-PLANNING		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
3	01100	PP-BUDGET		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
4	01130	PP-FEASIBILITY STUDY		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
5	01140	PP-OTHER PRE-PLANNING		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
6	01150	PP-HART ANALYSIS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
7	10.07100	PRE-PLANNING ADVERTISING		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
8	10.07110	PRE-PLANNING CAPITALIZED INTEREST		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
9	10.07120	PRE-PLANNING MISCELLANEOUS OTHER COSTS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
10	10.07130	PRE-PLANNING LEGAL		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
11	10.07140	PRE-PLANNING PARTNERING		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
12	01210	STUDY		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
13	20.01300	PRELIM ENGINEERING REPORT		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
14	01300	PER-BUDGET		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
15	01335	PER-0EOTECHNICAL		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
16	01340	PER - SUE		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
17	01345	PER - FULL RESPONSIBILITY		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

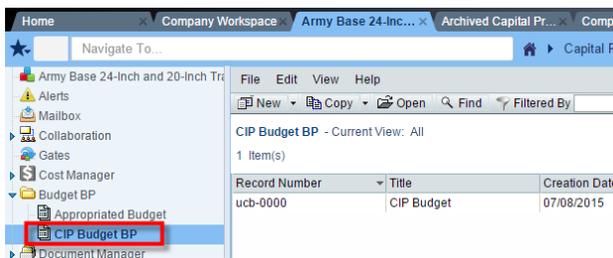


Schedule of Values - Information in the Schedule of Values is supplied through the E-Business Suite (EBS)-Unifier interface. Access to the cost sheet is permission controlled.

## Budget BP



Appropriated Budget – Appropriated Budgets are entered after approval from the Commission

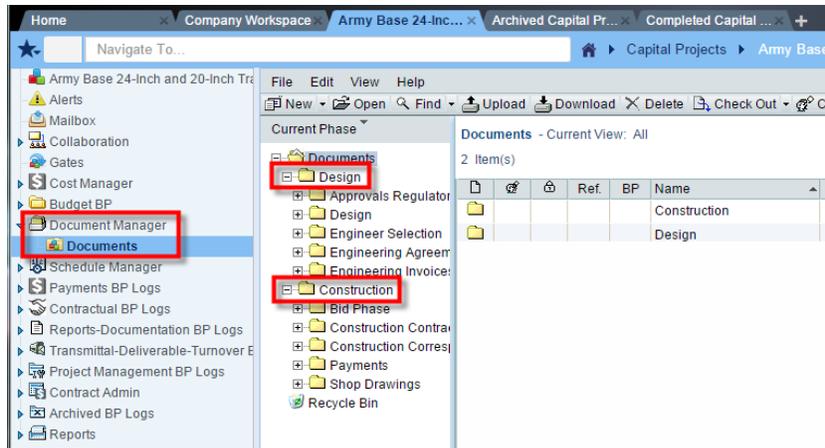


CIP Budget BP – The CIP Budget BP is completed at the time new CIP projects are added.

## Document Manager

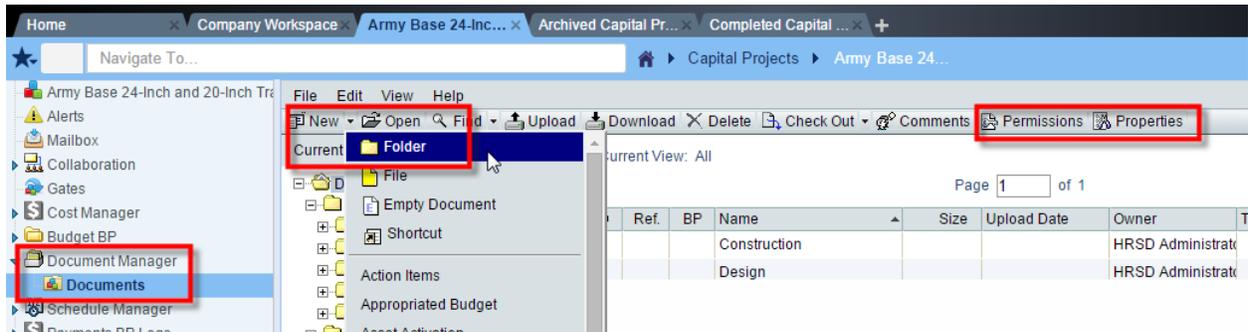
The Document Manager (DM) is a repository for all documents that need to be stored with the project but do not come in through a business process record. The upper level folder structure of the DM is fixed but folders can be added below the upper level.

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## Creating a folder:

First highlight the section of the DM that you want to add a new folder to. Click on the New button, or the arrow next to the New button and select folder. A window will open asking you to name the folder and add any other metadata you wish. Once the folder is created you can add specific permissions, via the permissions button, or assign properties to the folder via the properties button.

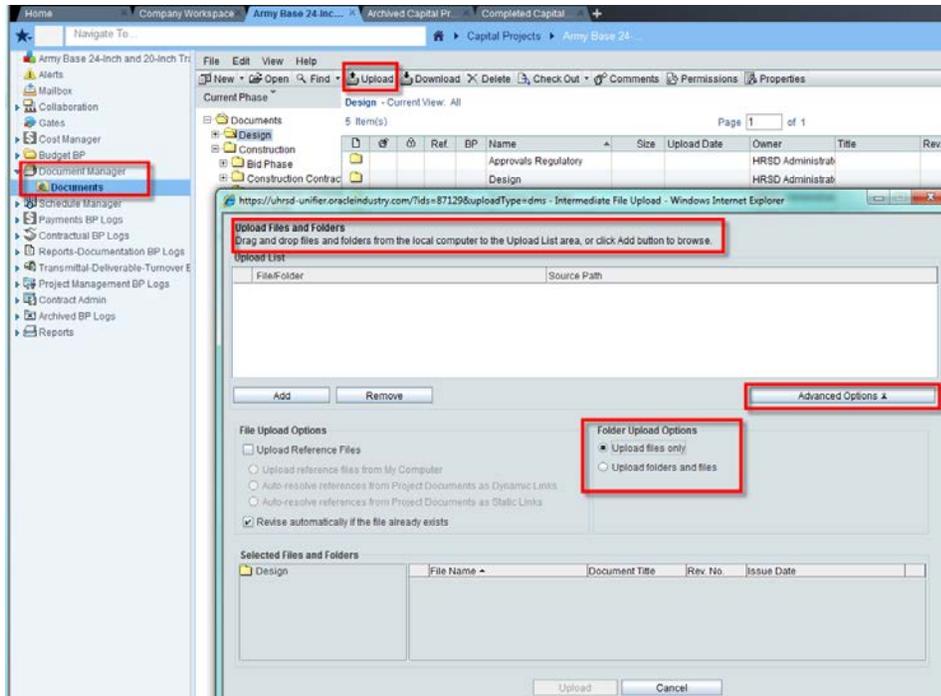


## Adding a document:

To add a document to a DM folder first highlight the folder and then click on the Upload button. A window will then open allowing the user to browse their computer for the file to be uploaded.\* This process is the same as adding an attachment to a business process.

\*The upload window may look different depending on the File Transfer Option selected in Preferences (see Frequently Asked Questions, 2. b). To upload folders and files, expand the Advanced Options and select from the Folder Upload Options as shown below.

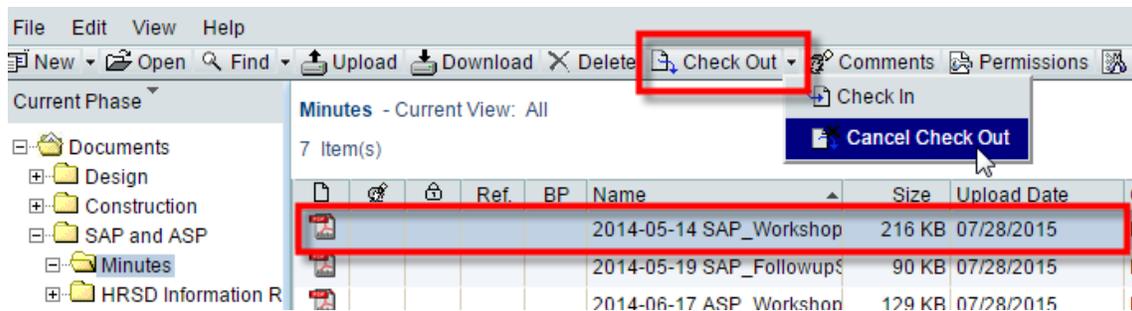
# UNIFIER USER MANUAL

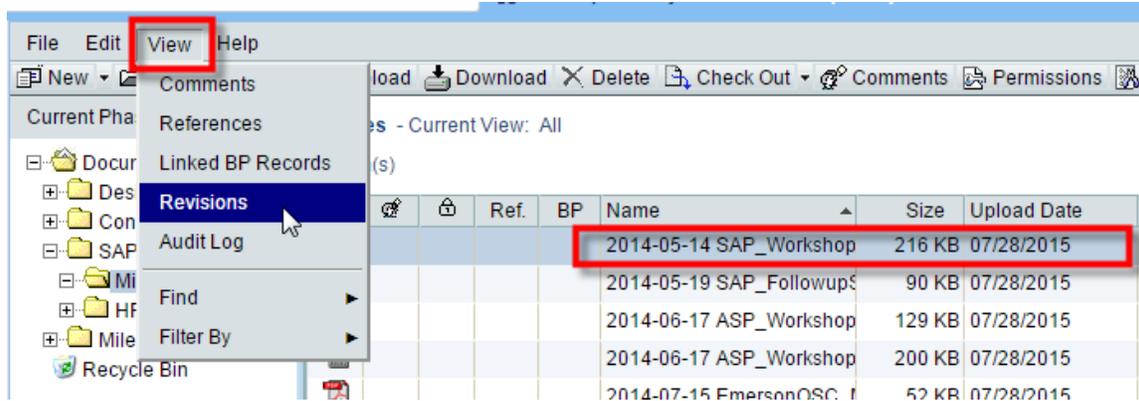


## Modifying a document:

The Unifier DM is a shared environment which means more than one user can view the same document at the same time. In order to modify a document in the DM it must first be checked out. Once the document is checked out it can be modified and then checked back in. The original version of the document will be saved and the latest version will be displayed when a user clicks on the file.

To check out a document, click on the Check Out button in the DM menu bar. The first time you do this, Unifier will direct you to create a folder on your computer to store checked out files. After you check out the document you can then make edits. Once edits are finalized go back to the DM, highlight the checked out file and the click on check in document. To view the previous versions of a file, highlight the file name and then go to the View menu and select Revisions.

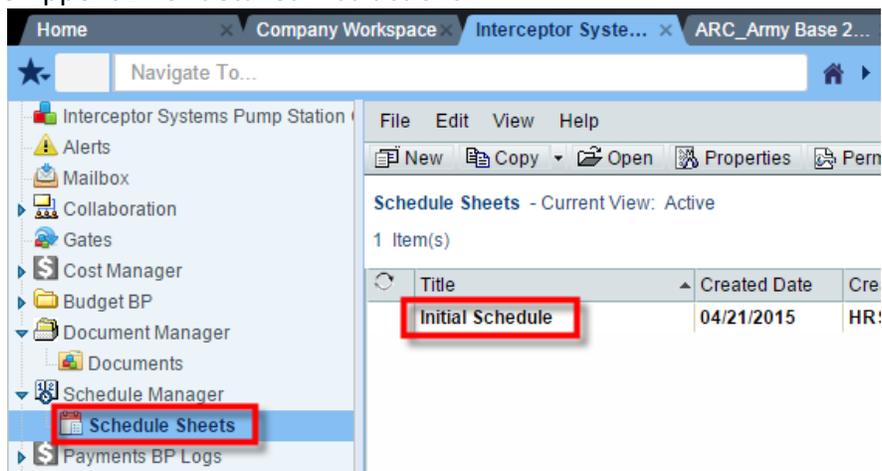




The HRSD Project Manager is the owner of the DM for their projects. If there are any questions with the folder structure of a project's DM, or where to store certain files, please contact the PM.

## Schedule Manager

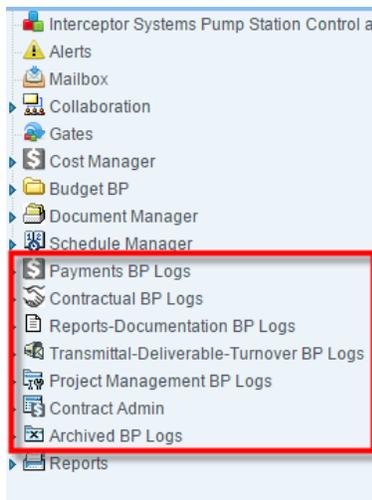
The Schedule Manager is used for internal project metric tracking. Additional schedule sheets can be added for project management. Schedules can be imported from MS Project and Primavera. See Appendix for detailed instructions.



# UNIFIER USER MANUAL

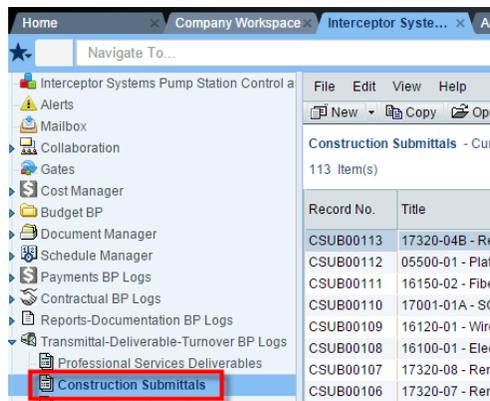
Initial Schedule				
Id	Activity Name	Start date	Finish date	Duration
1	<a href="#">Pre-Planning</a>	01/01/2009	01/01/2009	1
2	<a href="#">PER</a>	01/01/2009	06/30/2009	181
3	<a href="#">Design Delay</a>	06/30/2009	06/30/2009	1
4	<a href="#">Design</a>	07/01/2009	03/31/2014	1,730
5	<a href="#">Bid Delay</a>	03/31/2014	03/31/2014	1
6	<a href="#">Pre-Construction</a>	04/01/2014	09/30/2014	183
7	<a href="#">Construction</a>	10/01/2014	04/30/2017	943
8	<a href="#">Close Out</a>	05/01/2017	06/30/2017	61
9	<a href="#">Completion</a>	07/01/2017	07/01/2017	0

## Logs

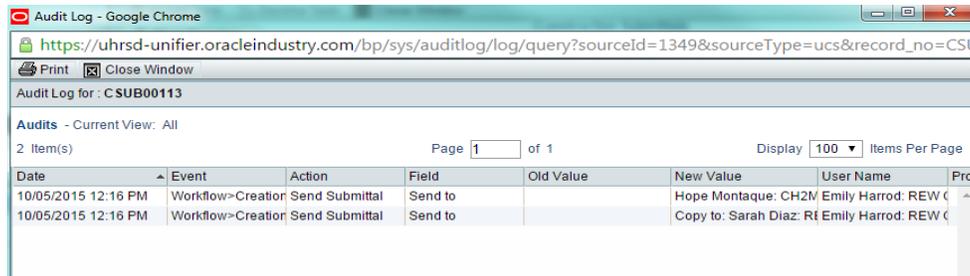
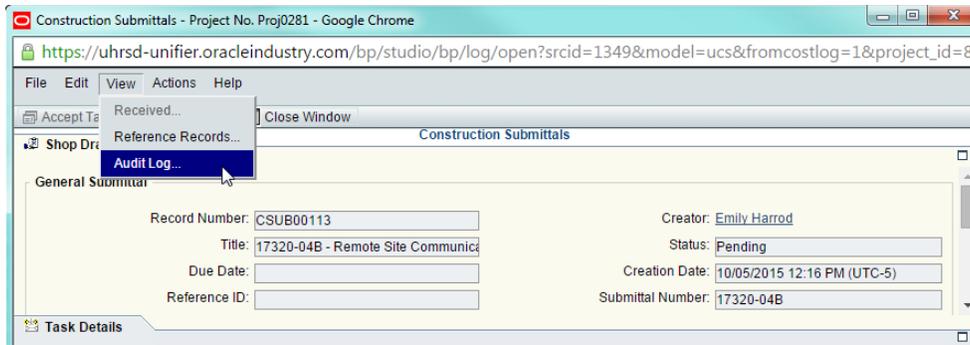


The Logs module serves as a repository for all in progress and completed workflow records. User can initiate a business process record from its specific log.

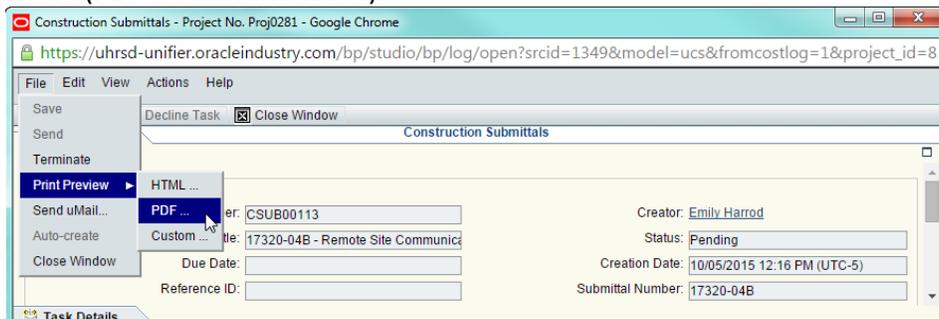
To audit a log, double click to open the record and select View from the menu. Click Audit Log to view the user and the action taken for the workflow.



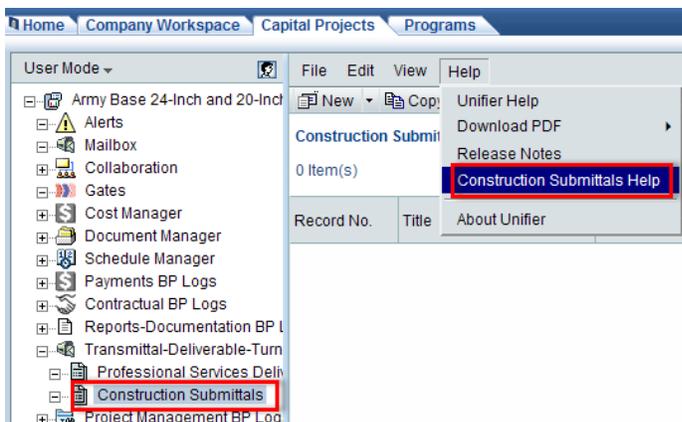
# UNIFIER USER MANUAL



To print an open record, select File from the menu then Print Preview and select one of the options available (PDF is recommended).



To view the workflow chart, select the name of the BP to open the log. Select Help from the menu, then the BPs name Help option. Select Open to view a PDF of the workflow.



# UNIFIER USER MANUAL

## BUSINESS PROCESS

Information is entered and stored in Unifier using electronic business process forms, and routed to project team members or other Unifier users via fully configurable workflows. Each time you fill out a business process form, you are creating a new record in Unifier. Within a project, the majority of business processes are located under the Project Logs node.

The screenshot displays the 'Create New Professional Services Deliverables' form in a web browser. The form is organized into three distinct sections:

- Upper Form:** This section contains general information fields including Title, Due Date, Record Number, Creator (Stefanie Crowell), Creation Date, Status, and Reference ID.
- Workflow or Action:** This section includes fields for 'To...', 'Cc...', and 'Send For', along with a 'Task Notes' field.
- Lower Form:** This section features an 'Attachments' table with columns for Title, Name, and Revision No., and a 'Comments' field.

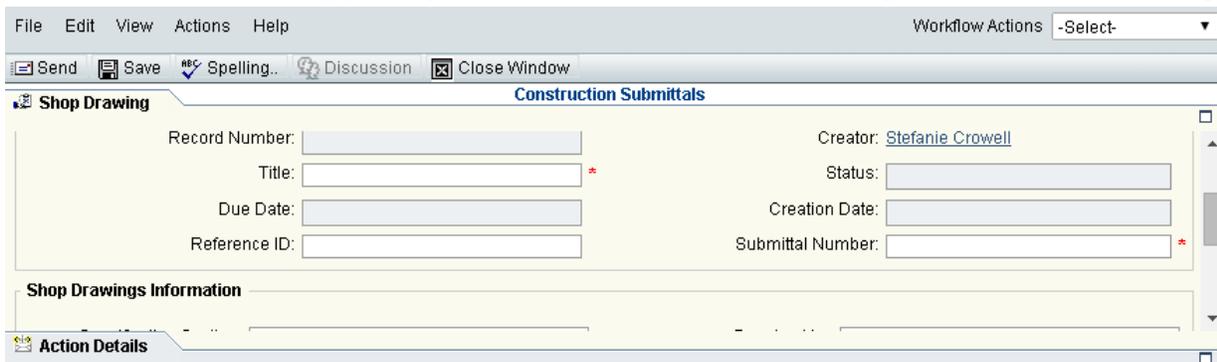
At the bottom of the form, there are links for 'Linked Records (0)', 'General Comments', and 'Linked Mail (0)'.

### **Upper Form**

The upper portion of the business process contains the basic (General) information that the form is managing, such as the name of the record and its description, who created the record and when, and other general information. It may also contain fields for referencing other forms, and it may contain fields that are required for specific functionality.

# UNIFIER USER MANUAL

Information in Asterisks (\*) is required for work to be reviewed and passed onto the next stage.

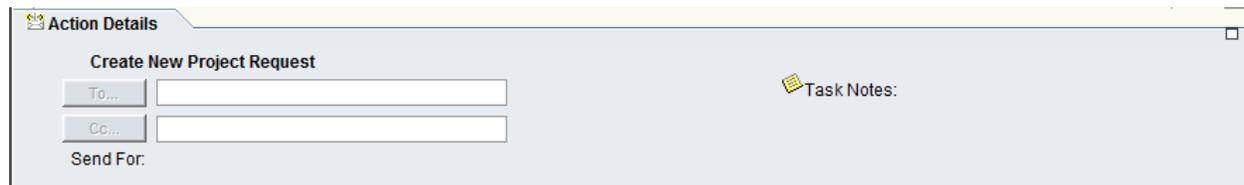


## Workflow or Action

This section appears in the middle part of workflow business processes. It is for viewing or assigning the next assignee in the workflow or shows the last person who took action on it. Depending on how the workflow has been set up for the BP, the next assignees may be predetermined, or you may be able to choose the next assignee or send a copy of the BP to another user.



After all the information is entered into the upper form, click on Workflow Actions then make a selection for the next step of the workflow. There may be one or multiple options based on workflow complexity.



When a workflow action has been selected the To and Cc can be filled in. Available selection is controlled by the business process workflow. The user will only be able to select from an approved list of users based on the next step of the workflow. This allows for the Business Process to be passed onto the next stage.

## Lower Form

The lower portion of the form contains the details and main content of the record, such as line items, file attachments for document-type business processes such as transmittals or submittals, or comments or instructions.

# UNIFIER USER MANUAL

Requested Disbursement...

Current View: All Show Currency in: Transaction Currency

1 Item(s) Page 1 of 1 Display 100 items per page

No.	WBS Code	Code Name	Account Number	Stored Materials Current Period	Work Completed Current Period	Amount
001		PER		0.00	27,895.14	27,895.14

Grid Find Total Amount: \$ 27,895.14

Attachments (2) **Linked Records (0)** General Comments Linked Mail (0)

## Attachments

Files can be attached to any BP by clicking on Add Attachment and selecting either Computer or Unifier Folder.

File Edit View Actions Help Workflow Actions -Select-

Send Save Spelling.. Undo Accept Task Add Attachment Discussion Close Window

CIP Project Request Project Reques My Computer Unifier Folder

## Linked Records

Another means to attaching additional information to a Business Process is clicking on Linked Records. Linked records allows for attachments of other related business process records that reside in a different log.

Attachments (0) **Linked Records (0)** General Comments

## General Comments

Users can add comments by clicking on general Comments → Add...

Close Window

Draft Comments

Text Comments	Attachments	Hidden Comment

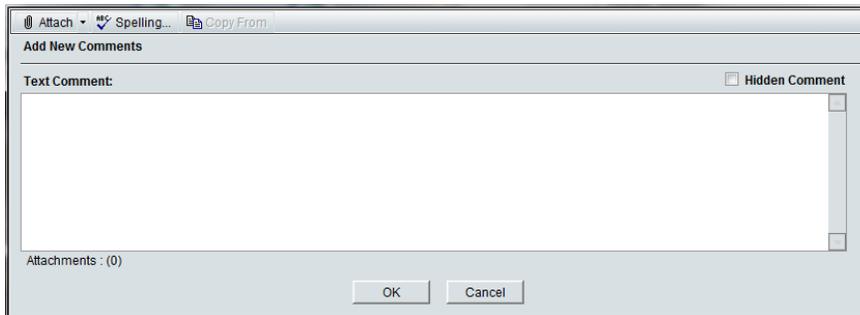
Add... Modify... Remove

Comments View Comments:  All (0)  Hidden (0) View Comments By: All

Date	Name	Company	Hidden Comment
------	------	---------	----------------

# UNIFIER USER MANUAL

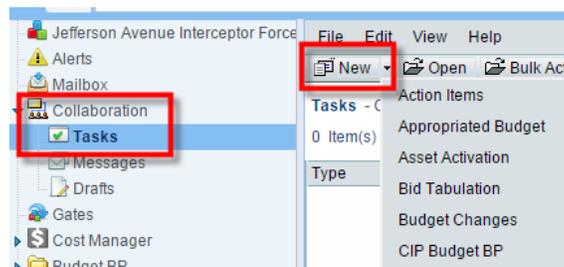
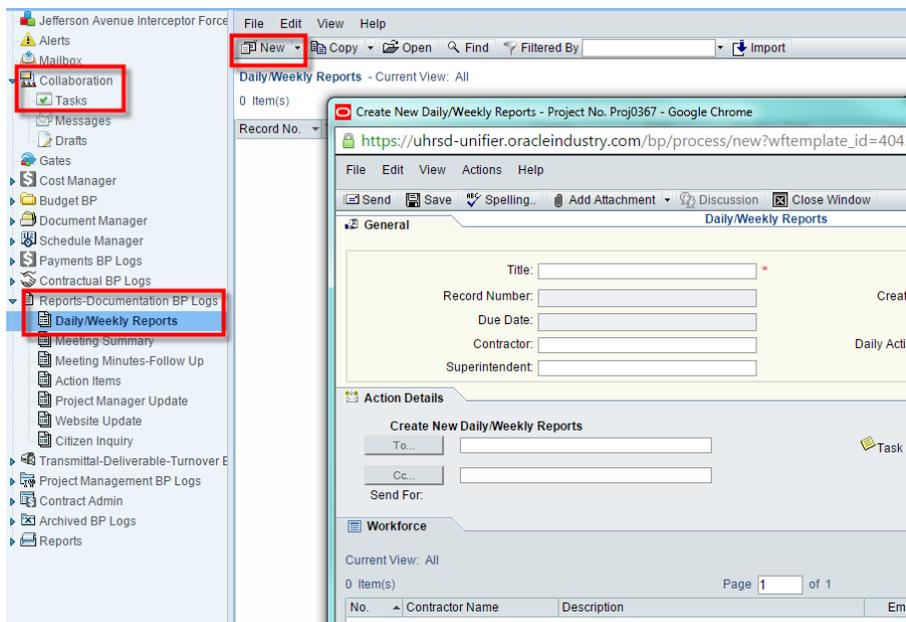
Each comment can be made public or hidden and later Modified and/or Removed



Check Hidden Comment to make comment hidden.

## Submitting a Business Process Record

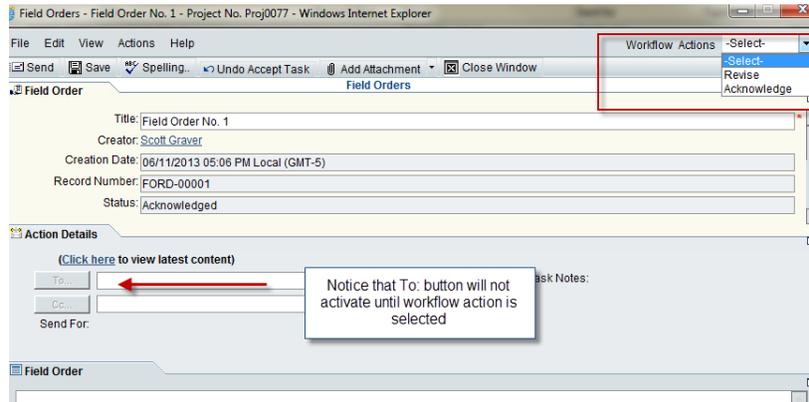
1. Select the appropriate business process record from either Collaboration/Task or from the individual business process log.



2. Fill out all required fields in the upper form

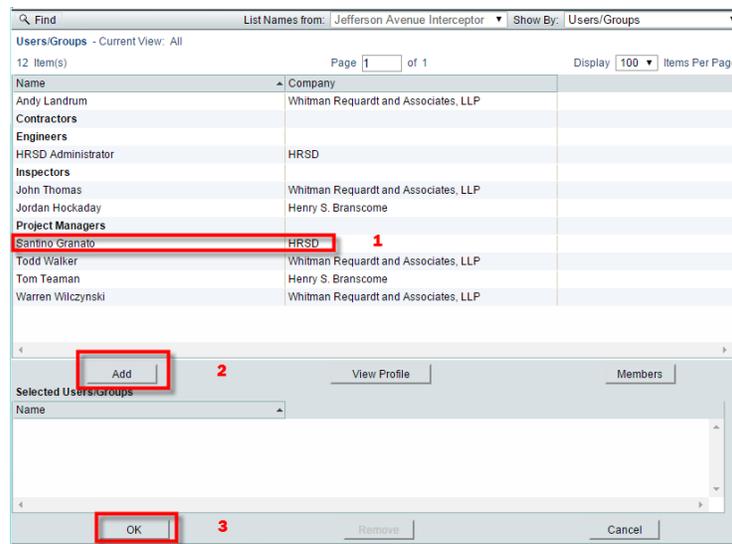
# UNIFIER USER MANUAL

3. Select workflow action. This is necessary to route the record to the appropriate approval group.



4. Once workflow action is selected, select who you want to send the record to for approval. Depending on the workflow construction, you will be limited to send the record to specific user groups. You can send the record to any person listed when you click the To button. Certain workflow steps also allow for a CC of project members. CC will only send a

notification, it will not the



notification, it will not the selected user.

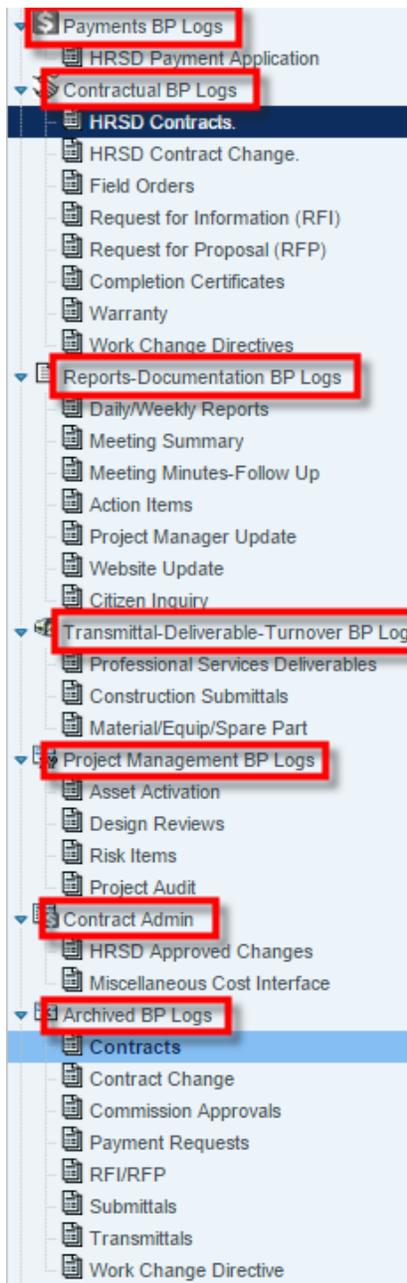
5. Click SEND. This will send the BP record to the selected user and that user will receive a notification via email. If there are any required fields that have not been entered, or any other errors, the BP record will not be sent and an error notification will appear.

# UNIFIER USER MANUAL

## HRSD SPECIFIC BUSINESS PROCESSES

The following Business Processes (BPs) are specific to HRSD project management. Each BP contains a description, a form preview and workflow (if applicable). The workflows attached to the listed BPs show which groups can create specific BP records, and which groups are in the approval path of specific BP records.

Within Unifier, these BP Logs are grouped in the following categories: Payment, Contractual, Reports-Documentation, Transmittal-Deliverable-Turnover, Project Management, Contract Admin and Archived.



\*The Archived BP Logs are for record purposes only. New logs cannot be created for these BP's.

## ACTION ITEMS

### DESCRIPTION

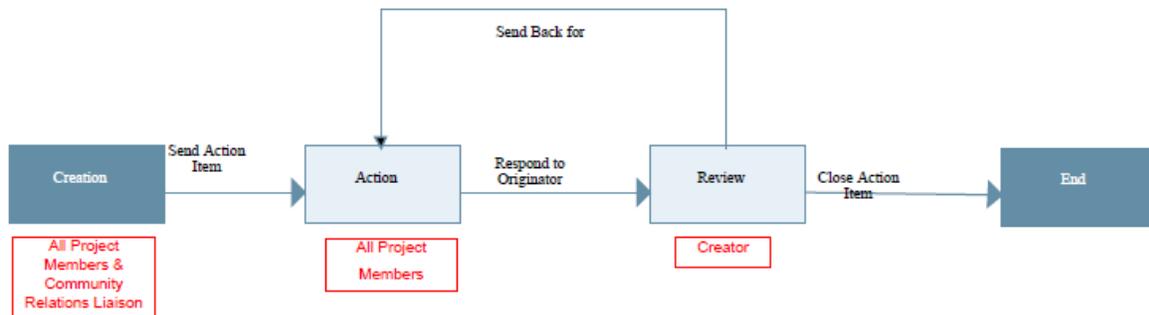
The Action Items business process is used to request an action to be taken by a team member. Action Items is a 4-step workflow that allows the originator to assign an action item to a team member. Once completed, the assignee replies back to the originator for Review. Upon review completion, the action item is closed.

### FORMS

- Form Preview

### WORKFLOW

- Basic Schema



## ASSET ACTIVATION

### DESCRIPTION

The Asset Activation business process is used to document when a pipeline, section of pipe, or mechanical, electrical, and/or treatment process system is officially placed into HRSD service. The business process is also used to document when an asset is deactivated and officially retired from HRSD service. The business process facilitates HRSD reflecting real time information in the GIS.

### FORMS

- Form Preview

The screenshot shows a web browser window displaying the 'Asset Activation' form. The browser address bar shows the URL: [https://primavera-unifier9.oracleindustry.com/7wftemplate\\_id=3285548&module\\_name=uaa&csvimport=-](https://primavera-unifier9.oracleindustry.com/7wftemplate_id=3285548&module_name=uaa&csvimport=-). The browser title is 'Windows Internet Explorer'. The form has a menu bar with 'File', 'Edit', 'View', 'Actions', and 'Help'. Below the menu bar are buttons for 'Send', 'Save', 'Spelling...', 'Undo Accept Task', 'Add Attachment', and 'Close Window'. The main form area is titled 'Asset Activation' and contains several sections: 'Interceptor Activati...' (partially visible), 'Asset Description', 'Action Details', and 'Asset Activation'. The 'Action Details' section includes a 'Send to Log' button, a 'To...' field with a dropdown, a 'Cc...' field with the text 'Drafting Prints Requests, GIS', and a 'Send For: End' button. The 'Asset Activation' section is a large empty text area. At the bottom of the form, there are links for 'Linked Records (0)' and 'Linked Mail (0)'. The 'Task Notes' section is also visible.

### WORKFLOW

- Basic Schema



# UNIFIER USER MANUAL

## CITIZEN INQUIRY

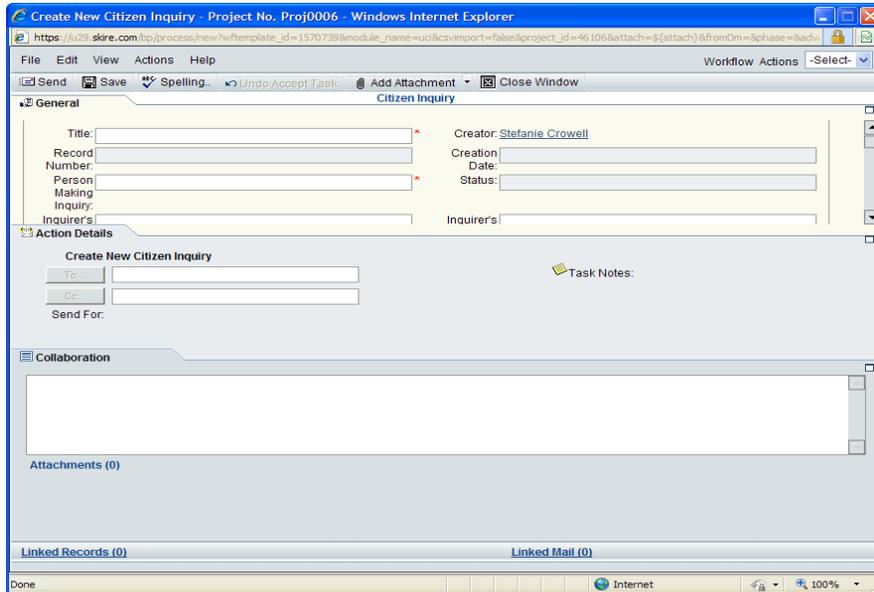
### DESCRIPTION

The Citizen Inquiry business process is a means of creating and then tracking an inquiry or claim through its process to ensure each item is addressed promptly, by the correct member of the project team, and follow-up is made with the requestor/claimant. The tracking of pertinent project specific information will help HRSD with preemptive measures in the future in regards to the public and property.

Note: A claim will originally be logged here as a means of capturing the initial outreach but will follow and finalize through a separate method (please contact the Community Relations Liaison).

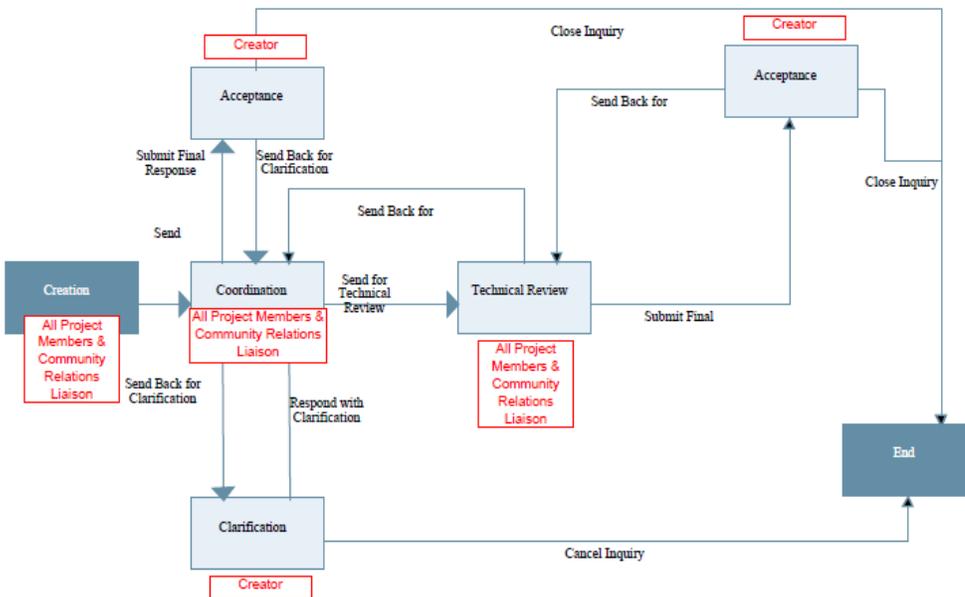
### FORMS

- Form Preview



### WORKFLOW

- Citizen Inquiry WF (Coordination Required)



- Send directly to log (No Coordination Required)



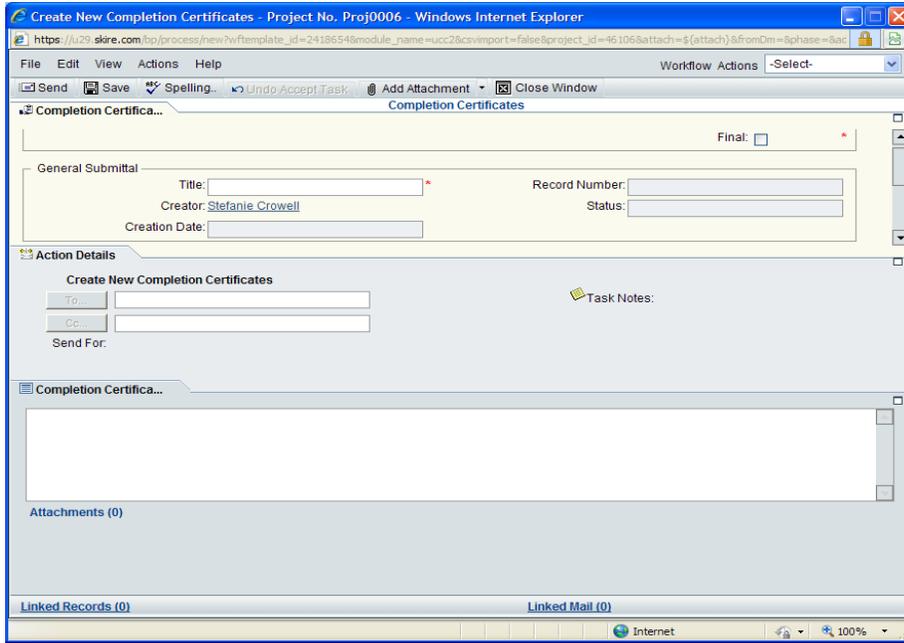
## COMPLETION CERTIFICATES

### DESCRIPTION

The Completion Certificates business process allows the contractor to submit a request for a substantial completion certificate or a final completion certificate. Issuance of a Substantial Completion certificate requires the work to be inspected and a punch list prepared. Issuance of a Final completion certificate requires the work to be inspected to ensure all punch list items have been completed.

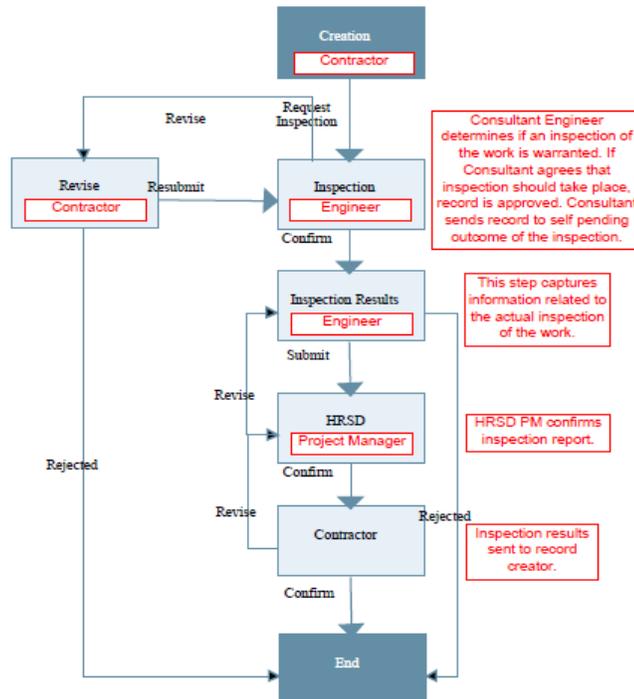
### FORMS

- Form Preview



### WORKFLOW

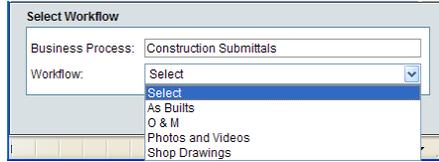
- Basic Schema



## CONSTRUCTION SUBMITTALS

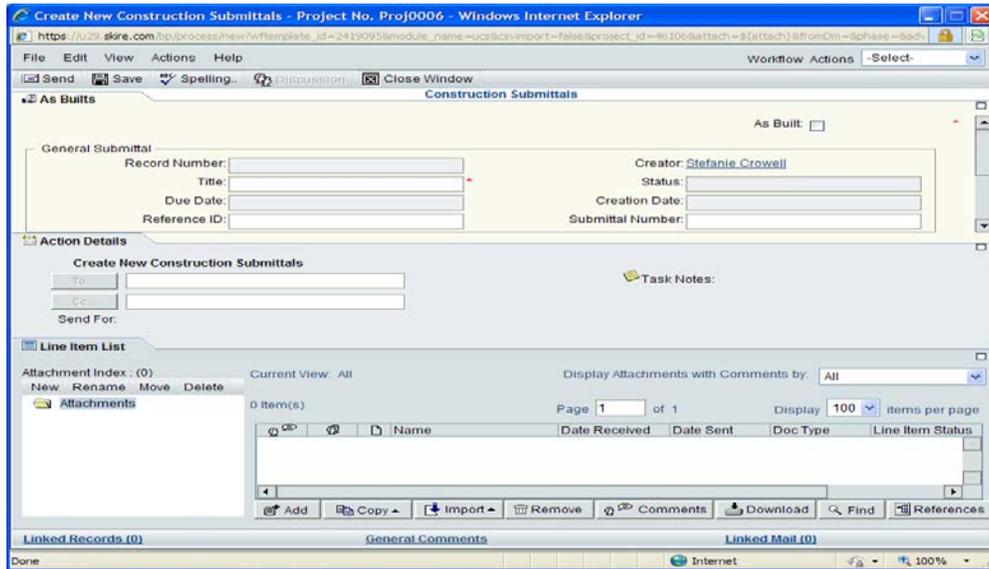
### DESCRIPTION

The Construction Submittals business process is used to transmit As-BUILTs, Operation and Maintenance Manuals, Photos and Videos, and Shop Drawings to a team member to process, send out for collaboration, and review. Each type of Construction Submittal has its own form and fields. Select the appropriate type of submittal from the dropdown menu.



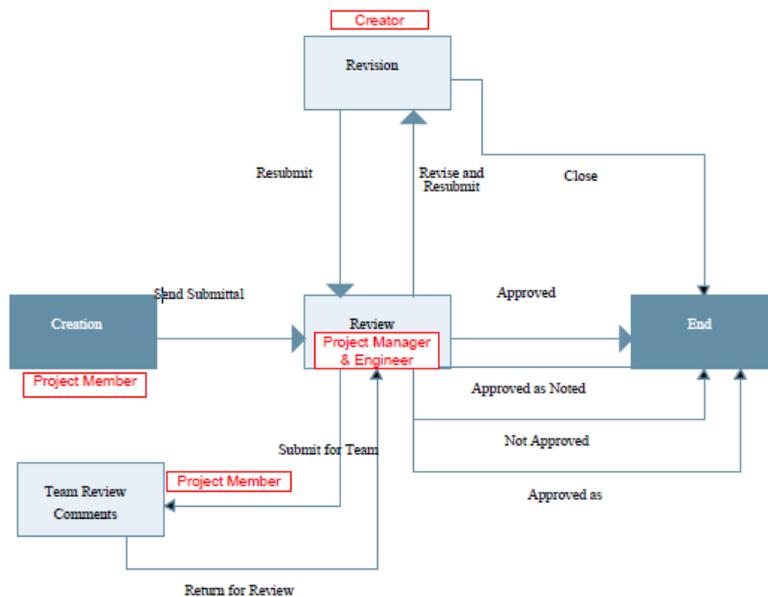
### FORMS

- Form Preview



### WORKFLOW

- Basic Schema



## DAILY/WEEKLY REPORTS

### DESCRIPTION

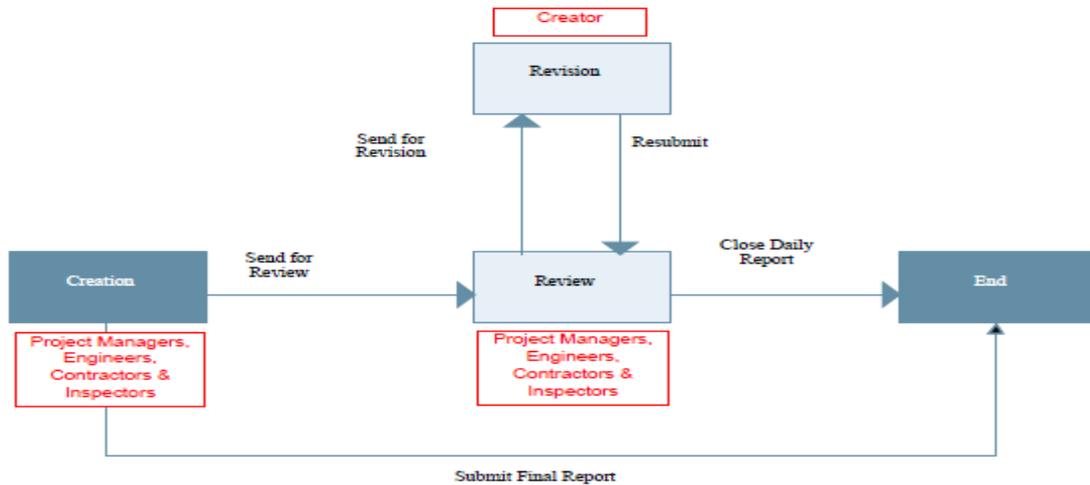
Daily Report business process provides a report of any activity, progress, site visit, issues, resolutions and other pertinent information on the project. The workflow supports review of the daily report prior to becoming final.

### FORMS

- Form Preview

### WORKFLOW

- Basic Schema



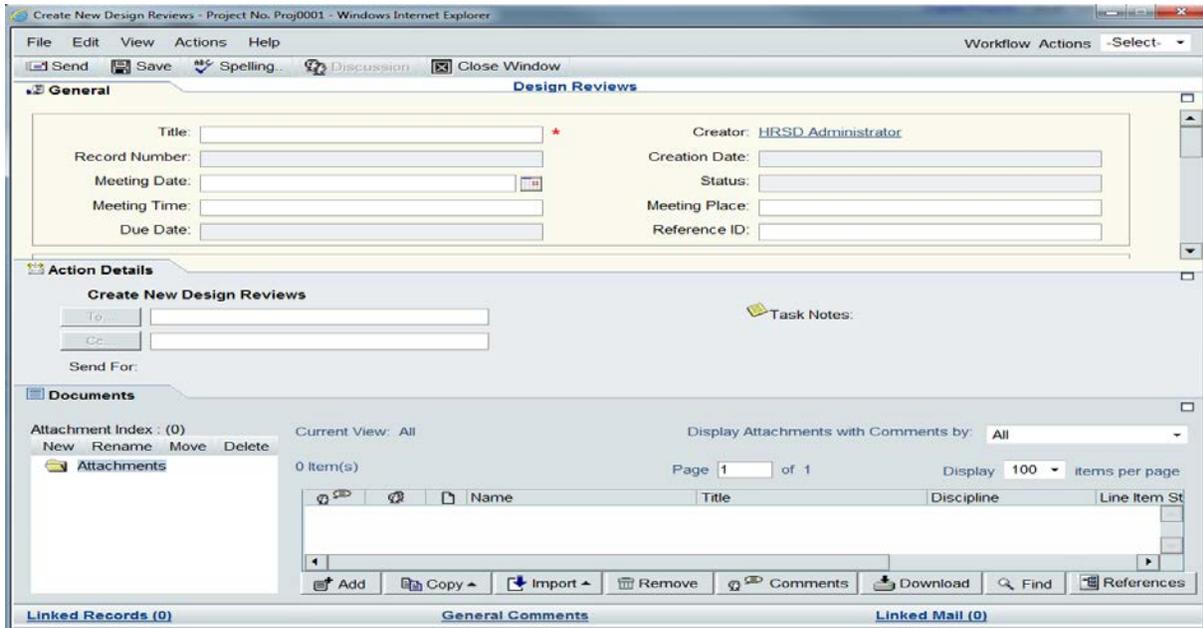
## DESIGN REVIEWS

### DESCRIPTION

Design Reviews business process supports electronic review and approval of design documents by the owner. The form supports large numbers of attachments with support for an entire folder structure, and includes features for electronic collaboration, commenting, redlines/markups.

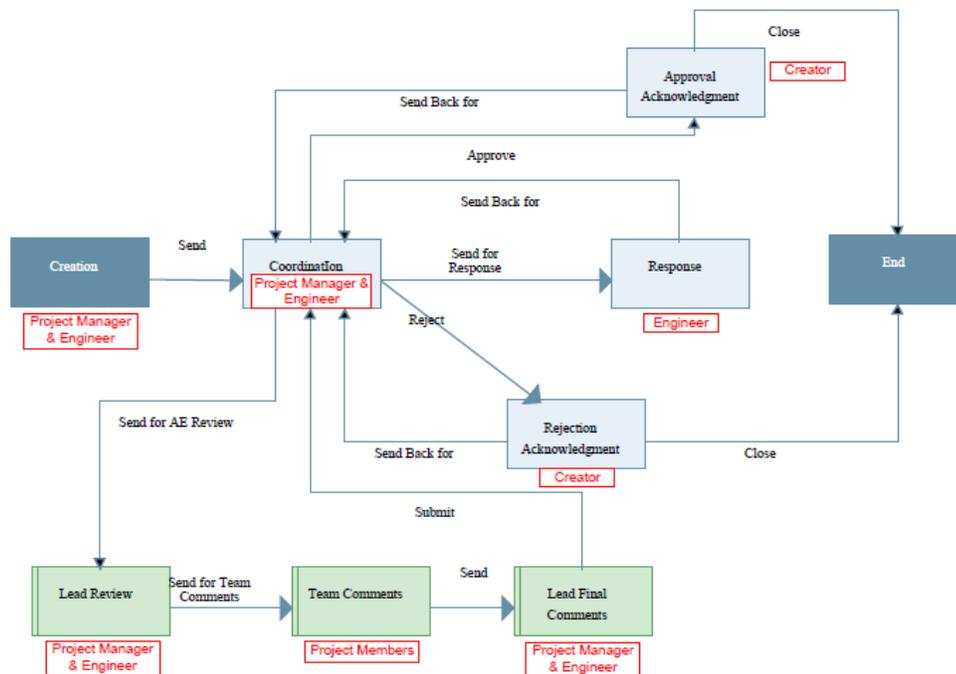
### FORMS

- Form Preview



### WORKFLOW

- Basic Schema



## FIELD ORDERS

### DESCRIPTION

The Field Order business process is used by a team member to issue a written order to the Contractor which requires a minor change to the construction contract that doesn't impact the contract price or the contract times.

### FORMS

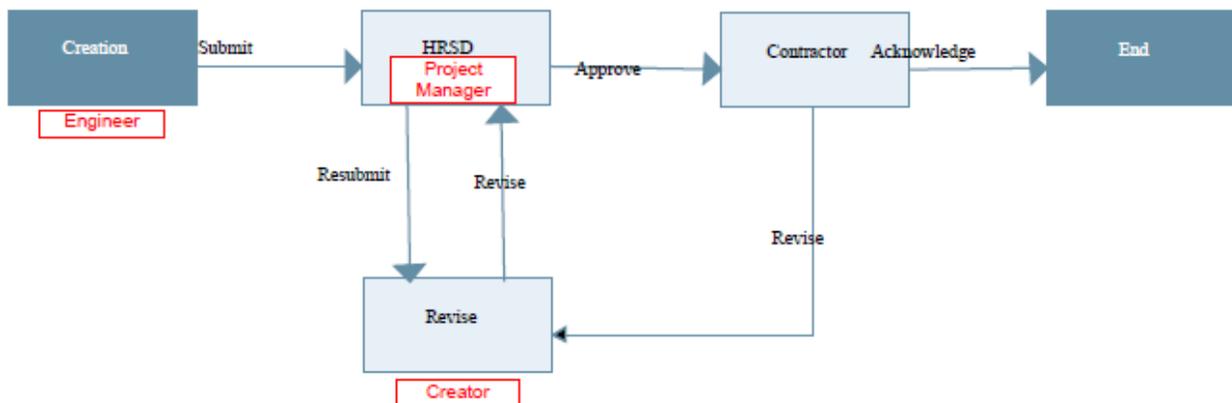
- Form Preview

The screenshot shows a web browser window titled "Create New Field Orders - Project No. Proj0006 - Windows Internet Explorer". The address bar shows the URL: [https://u29.skire.com/bp/process/new?project\\_id=46106&module\\_name=ufo&csvimport=false](https://u29.skire.com/bp/process/new?project_id=46106&module_name=ufo&csvimport=false). The browser menu includes File, Edit, View, Actions, and Help. The main content area is titled "Field Order" and contains several sections:

- Field Order:** Includes input fields for Title, Creator (pre-filled with "Stefanie Crowell"), Creation Date, Record Number, and Status.
- Action Details:** Includes a "Create New Field Orders" section with "To...", "Cc...", and "Send For:" fields, and a "Task Notes:" area.
- Field Order:** A large empty text area for additional information.
- Attachments (0)** and **Linked Records (0)** sections are visible at the bottom.

### WORKFLOW

- Basic Schema



# UNIFIER USER MANUAL

## MATERIAL/EQUIPMENT/SPARE PARTS

### DESCRIPTION

The Materials/Equipment/Spare Parts business process is used to document the turnover of material, equipment, or spare parts from the general contractor to HRSD. The business process identifies the who, what, when, and where of material, equipment, or spare parts being turned over. The business process logs facilitate HRSD locating the items in the future.

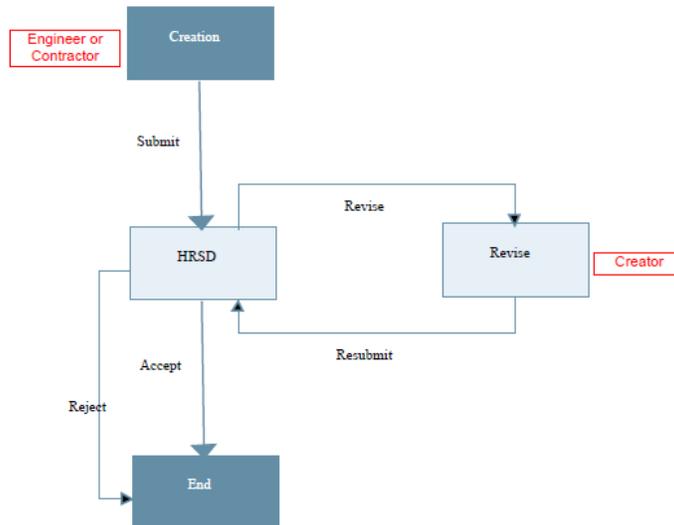
### FORMS

- Form Preview

The screenshot displays the Unifier web application interface for creating a new Material/Equip/Spare Part record. The form is titled "Material/Equip/Spare Part" and is currently in the "General" tab. The "Title" field is set to "Approved" and the "Status" is "Approved". The "Creator" is listed as "Stefanie Crowell". The "Record Number" and "Creation Date" fields are empty. The "Delivered By" and "Received By" fields are also empty. The "Delivery Location" and "Storage Location" fields are empty. Below the form is the "Action Details" section, which includes a "Create New Material/Equip/Spare Part" button and a "Task Notes" field. At the bottom of the form is the "Line item Detail" section, which shows a table with columns for "No.", "Sm", "Short Description", "Quantity", "Unit", and "Condition". The table is currently empty, showing "0 Item(s)" and "Page 1 of 1".

### WORKFLOW

- Basic Schema



## HRSD CONTRACTS

### DESCRIPTION

The HRSD Contracts business process is automatically generated from contracts processed in E-Business Suite (EBS).

## HRSD CONTRACT CHANGE

### DESCRIPTION

The HRSD Contract Change business process is automatically generated from contracts processed in E-Business Suite (EBS).

## HRSD PAYMENT APPLICATION

### DESCRIPTION

The HRSD Payment Application business process is automatically generated from contracts processed in E-Business Suite (EBS).

## MEETING SUMMARY

### DESCRIPTION

Meeting Summary allows a team member to create and track pertinent meeting minutes for projects, which can be sent out for review using the configured workflow. Each line item auto creates a Meeting Minutes-Follow Up record once the meeting minutes have been approved by all recipients.

### FORMS

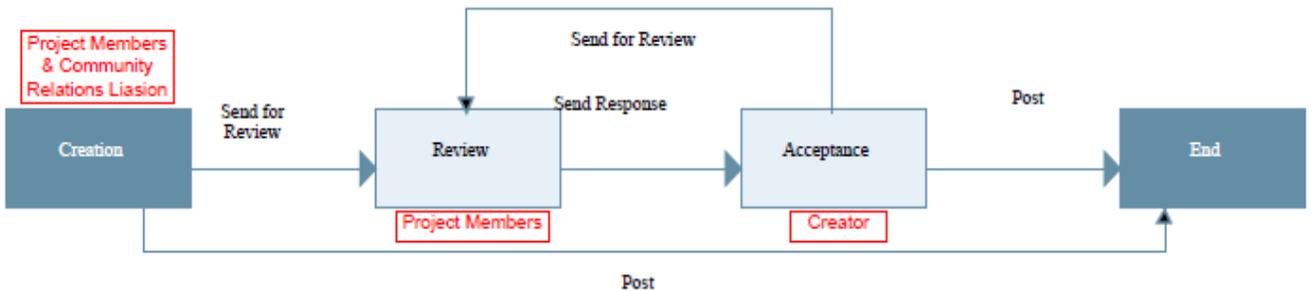
- Form Preview

The screenshot shows a web browser window titled "Create New Meeting Summary - Project No. Proj0001 - Windows Internet Explorer". The browser's address bar and menu bar are visible. The main content area is divided into several sections:

- Meeting Summary:** Contains a text box with instructions: "Assignees will be sent Meeting Minutes-Follow Up records to track completion of their assigned tasks. Please select the person who will be responsible for reviewing completion of these tasks." Below this is a "When Finished, Send To:" field with a "Select..." button.
- Form Fields:** Includes "Title:" (required), "Record Number:", "Due Date:", "Creator:" (pre-filled with "HRSD Administrator"), "Creation Date:", and "Status:".
- Action Details:** Features "To:" and "Cc:" fields, a "Send For:" field, and a "Task Notes:" section.
- Action Line Items:** A table with columns: "No.", "Description", "Assignee", "Action Required", and "Due Date". It shows "0 Item(s)" and "Page 1 of 1".
- Toolbar:** Includes "Add", "Copy", "Import", "Remove", "Grid", and "Find" buttons.
- Footer:** Shows "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

### WORKFLOW

- Meeting Minutes Flow



## MEETING MINUTES-FOLLOW UP

### DESCRIPTION

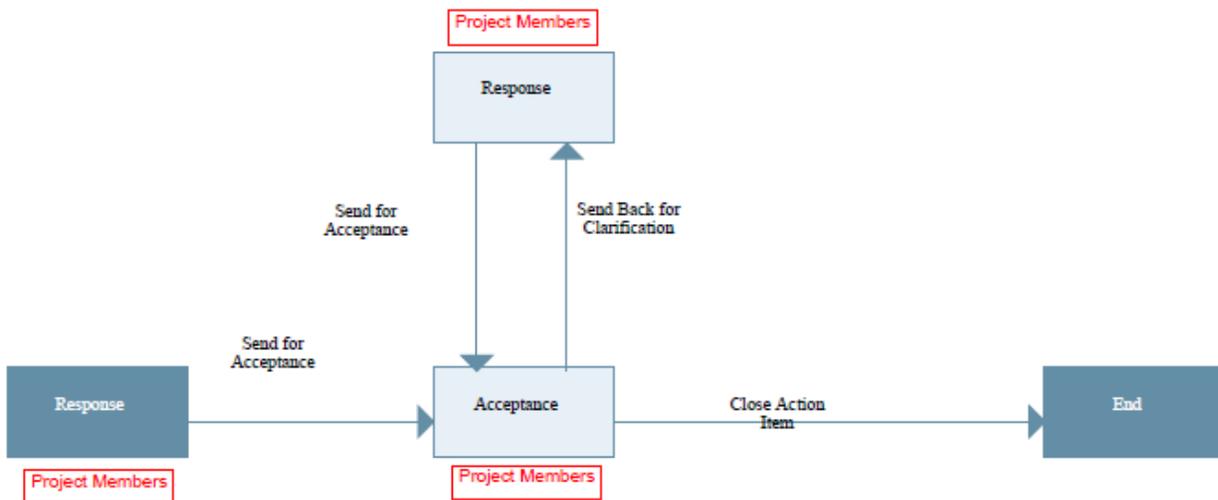
Meeting Minutes-Follow Up is auto created from the line items of the Meeting Minutes business process once the minutes have been approved by all recipients. This allows a team member to assign an action item and track pertinent information for projects, which can be sent out for review and follow up using the configured workflow. Each line item auto creates a Meeting Minutes-Follow Up record.

### FORMS

- Form Preview

### WORKFLOW

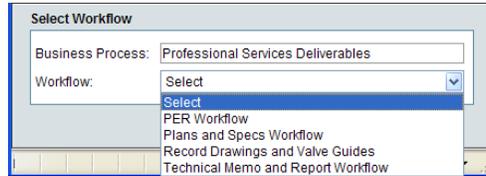
- Meeting Minutes-Follow Up Flow



## PROFESSIONAL SERVICES DELIVERABLES

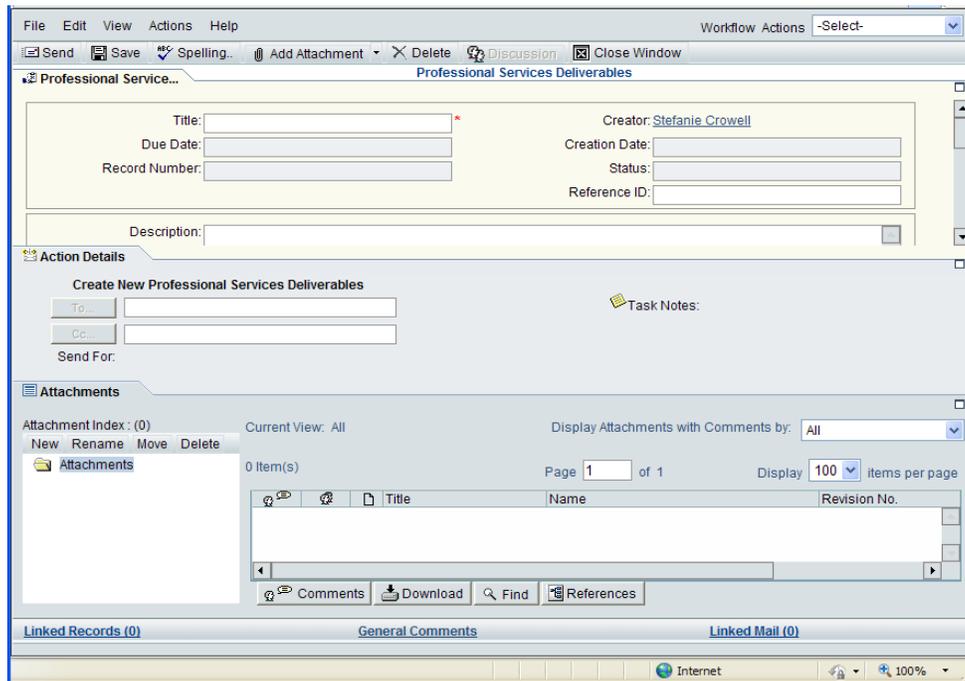
### DESCRIPTION

The Professional Services Deliverables business process is used to transmit Technical Memorandums, PER's, Plans and Specifications during the intermediate design, bid and conformed stages, Record Drawings, and Valve Guides. Each type of deliverable generates its own form and fields for submission. Select the appropriate type of submittal from the dropdown menu.



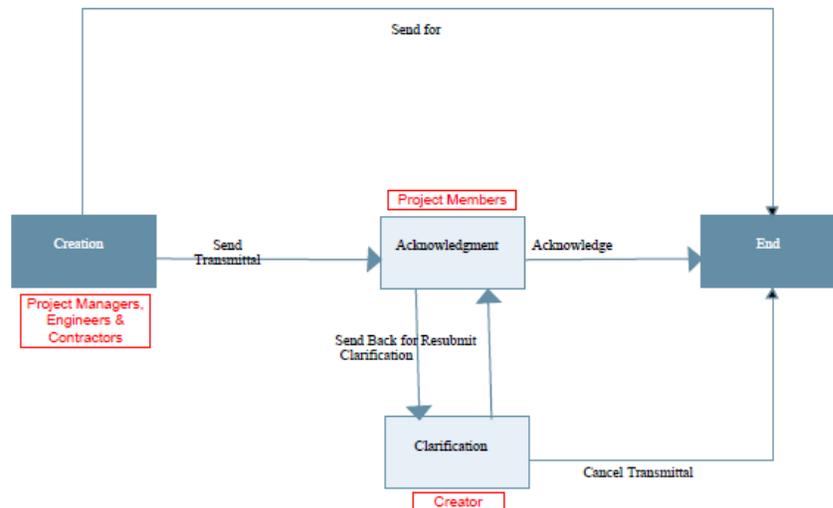
### FORMS

- Form Preview



### WORKFLOW

- Acknowledgement



## PROJECT MANAGER UPDATE

### DESCRIPTION

The Project Manager Update business process allows the Project Manager to provide continual status updates on a project's progress. The information provided in the Project Manager Update BP record will be used to create the Design and Construction monthly report, as well as, other internal project metrics. Only one record is active per project and will be overwritten each month.

### FORMS

- Form Preview

The screenshot shows a software application window titled "Project Manager Update". The window has a menu bar with "File", "Edit", "View", and "Help". Below the menu bar is a toolbar with icons for "Finish Editing", "Save", "Spelling...", "Add Attachment", and "Close Window". The main content area is divided into several sections:

- Status:** A dropdown menu set to "Approved".
- Architect/Engineer:** A text input field with a "Select..." button to its right.
- Contractor:** A text input field with a "Select..." button to its right.
- Project Status:** A dropdown menu set to "-Select-".
- Monthly Project Update:** A large text area with a vertical scrollbar on the right side.
- Potential Commission Items:** A text area with a vertical scrollbar on the right side.

At the bottom of the window, there is a footer bar with four links: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

## REQUEST FOR INFORMATION (RFI)

### DESCRIPTION

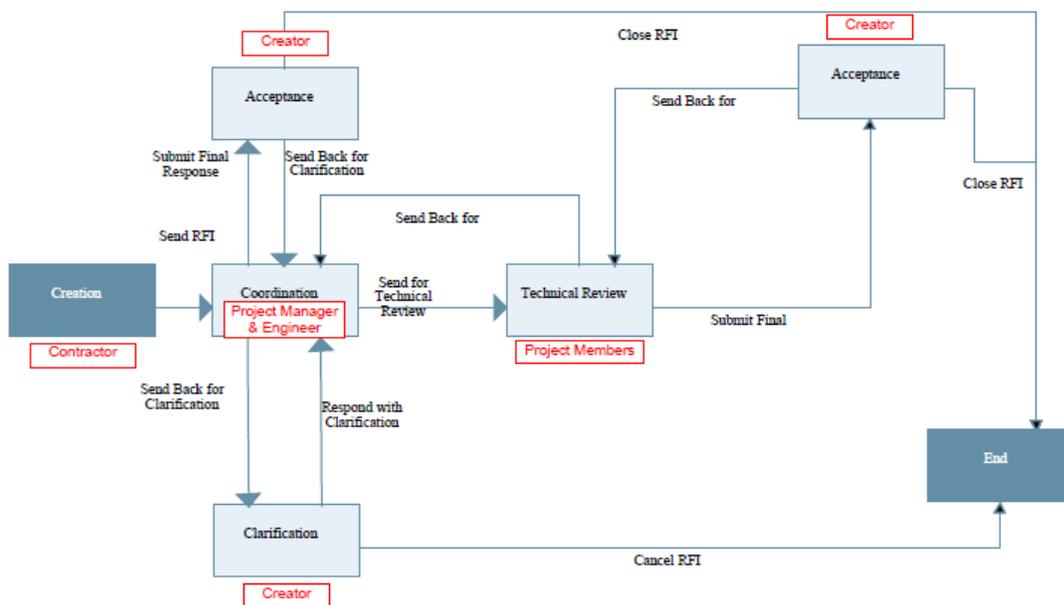
Request for Information (RFIs) business process is to request information or clarification from vendors, contractors, the owner or other team members. This workflow also allows for submission of a request for proposal (RFP).

### FORMS

- Form Preview

### WORKFLOW

- Basic Schema



## REQUEST FOR PROPOSAL (RFP)

### DESCRIPTION

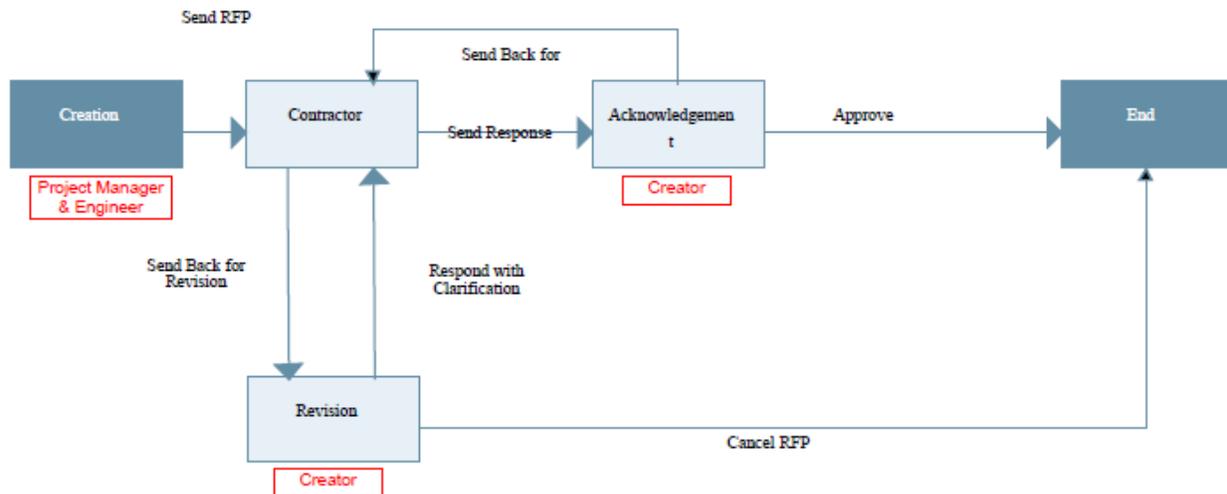
Request for Information (RFIs) business process is to request information or clarification from vendors, contractors, the owner or other team members.

### FORMS

- Form Preview

### WORKFLOW

- Basic Schema



## RISK ITEMS

### DESCRIPTION

The Risk Items business process provides a log to allow a project manager to identify potential financial impact on a project and define mitigation plans. Risk Items impact the project forecast.

### FORMS

- Form Preview

The screenshot displays a web application interface for managing Risk Items. The interface is divided into two main sections: a form for creating or editing a risk item, and a table for viewing probable costs.

**Risk Item Form:**

- Title:** A text input field with a red asterisk indicating it is required.
- Record Number:** A text input field.
- Environmental Impact?:** A dropdown menu with the option "-Select-".
- Description:** A large text area with a red asterisk indicating it is required.
- Creator:** A read-only field displaying "HRSD Administrator".
- Creation Date:** A text input field.
- Status:** A dropdown menu with the option "-Select-" and a red asterisk indicating it is required.

**Probable Cost Table:**

The table is currently empty. It has the following columns:

No.	WBS Code	Description	Amount
-----	----------	-------------	--------

**Form Controls:**

- Estimated Costs:** A checkbox that is currently unchecked.
- Current View:** Set to "All".
- 0 Item(s):** Indicates no items are currently displayed.
- Page 1 of 1:** Shows the current page and total pages.
- Display 100 items per page:** A dropdown menu for selecting the number of items to display per page.
- Toolbar:** Includes buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find".
- Total Amount:** A field showing "\$ 0.00".

**Navigation:**

- Attachments (0):** A link to view attachments.
- Linked Records (0):** A link to view linked records.
- General Comments:** A link to view general comments.
- Linked Mail (0):** A link to view linked mail.

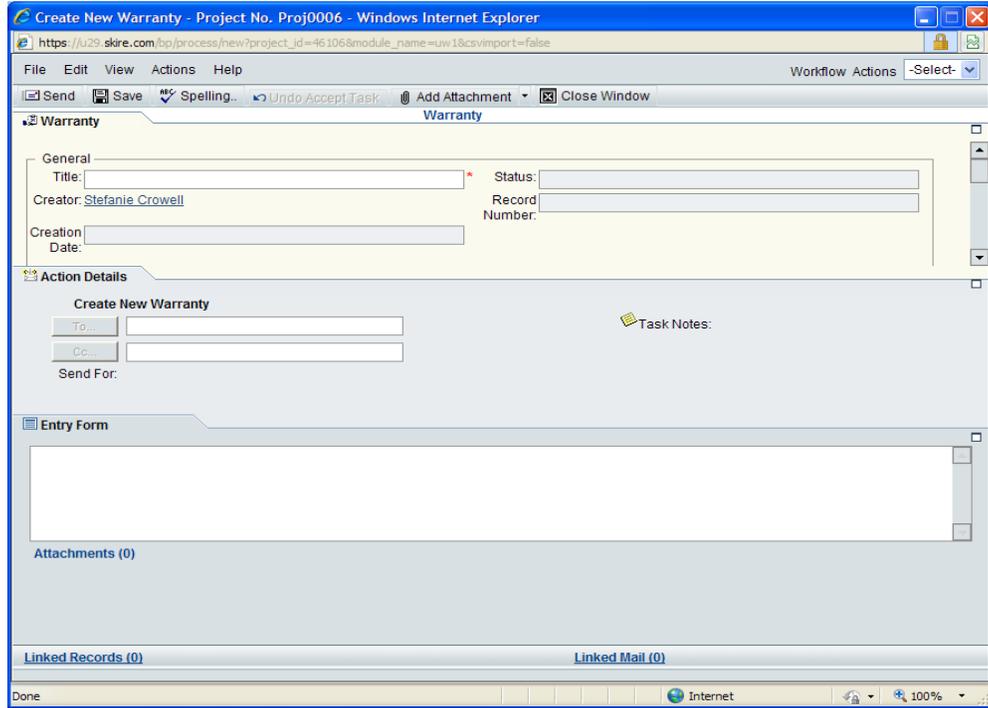
## WARRANTY

### DESCRIPTION

The Warranty business process allows the HRSD customer to report items (defects, deficiencies, and issues) that should be resolved by the contractor during the warranty period. The process documents the reporting and resolution of the warranty claims.

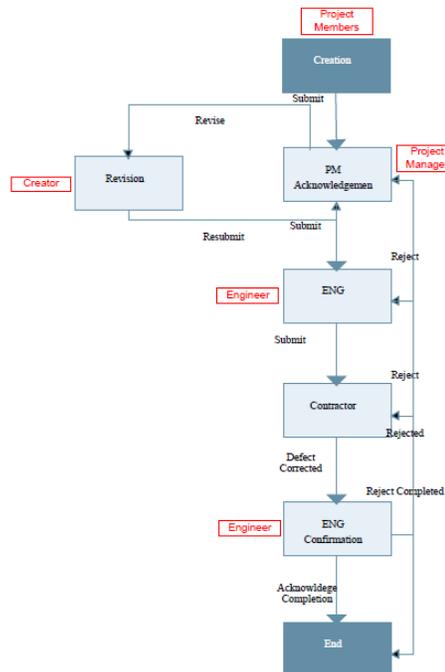
### FORMS

- Form Preview



### WORKFLOW

- Basic Schema



## WEBSITE UPDATE

### DESCRIPTION

The Website Update business process allows the Project Manager or Engineer to provide status updates on a project's progress. The information provided in the BP record will be used to update HRSD's website. Only one record is active per project and will be overwritten with each revision.

### FORMS

- Form Preview

The screenshot shows a software application window titled "Project Manager Upda....." with a sub-tab "Website Update". The window has a menu bar (File, Edit, View, Help) and a toolbar with icons for "Finish Editing", "Save", "Spelling..", "Add Attachment", and "Close Window".

The main form area is divided into several sections:

- ALWAYS UPDATE "DATE OF UPDATE" FIELD**: This section contains a "Status:" dropdown menu with "-Select-" selected, a red asterisk to its right, and a "Date of Update:" date picker. Below these are text input fields for "Alternate Project Name:", "Project Overview:", "Project Update for Web:", and "Roads Affected:".
- Key Dates**: This section contains text input fields for "Staging:", "Construction:", and "Restoration:". The "Restoration:" field has the text "Immediately Following Construction" entered.
- Contacts-Use phone number format: (xxx)xxx-xxxx**: This section contains text input fields for "Engineer Contact Name:" and "Engineer Phone Number:".

At the bottom of the window, there is a navigation bar with the following links: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

## WORK CHANGE DIRECTIVE

### DESCRIPTION

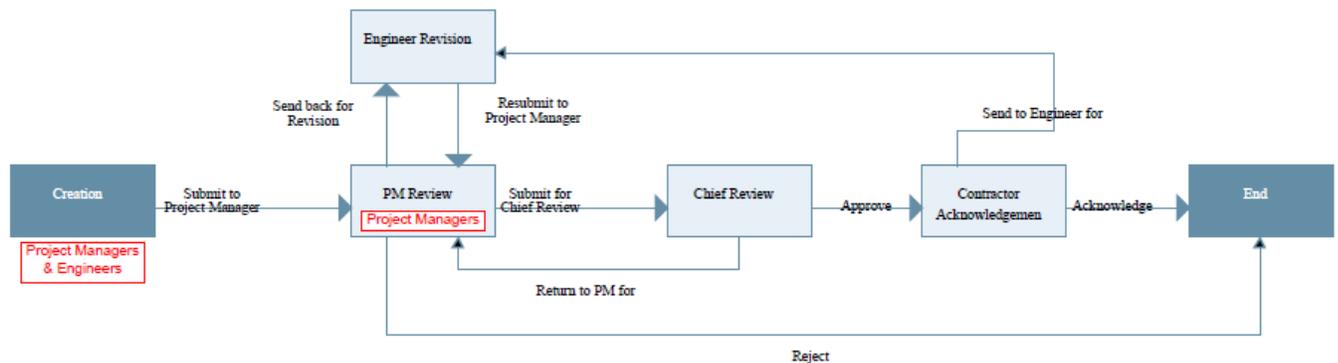
The Work Change Directive (WCD) business process is used by Engineering Consultants or HRSD Project Managers in order to authorize and/or direct contractors to perform additional work in a timely fashion when scope of work, cost or time are difficult to determine beforehand or when scope of work, cost, time, responsibility or need are in dispute. WCD's are also occasionally used to identify relatively small changes and/or additional work so that several such items can be combined into a single Change Order.

### FORMS

- Form Preview

### WORKFLOW

- Basic Schema



## FREQUENTLY ASKED QUESTIONS (FAQ)

1. *Why am I unable to view my project in the Capital Projects tab?*

This is usually a permission issue. Each user has specific permissions applied to their account. If you are a Consultant or Contractor for a specific project, you must be granted permissions to be able to select the project from the list of projects located on the Capital Projects/Archived Capital Projects tab. Contact the [Unifier Administrator](#) or the Project Manager to request access.

2. *Why can't I upload/download documents?*

There are multiple causes why users may not be able to upload/download documents.

- a. The wrong browser version and/or Java version are the most likely cause for this issue. Please refer to the compatibility table on [Page 4](#) of the manual to confirm the correct versions are set.
- b. If the correct browser and Java versions are set, another cause may be the File Transfer Option. To check this setting, click on the user name on the top right of the window, select Preferences, then the Options tab.

There are three choices for the File Transfer Option:

- I. Basic: HTML-based, does not require the installation of special software
- II. Intermediate: requires installation of Java
- III. Advanced: requires installation of Java and the Primavera Unifier File Transfer Utility (refer to [Appendix A](#) for installation instructions)

With the Advanced option, the Unifier File Transfer Utility works in conjunction with Java to provide the greatest flexibility for uploading and downloading documents and folders. It supports drag-and-drop uploading/downloading of multiple files and folders. Its advanced functionality for managing reference file relationships in DWG and DGN drawing files makes it easier for users to locate, upload, revise and download reference files. If you are using the Space Manager, the Advanced option must be used for uploading drawing files into the Space Manager.

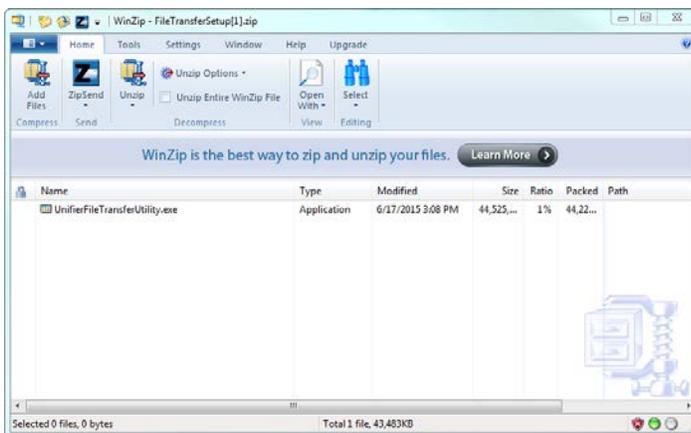
## APPENDIX A

### Advanced File Transfer

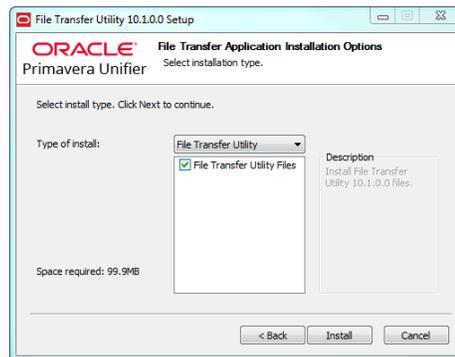
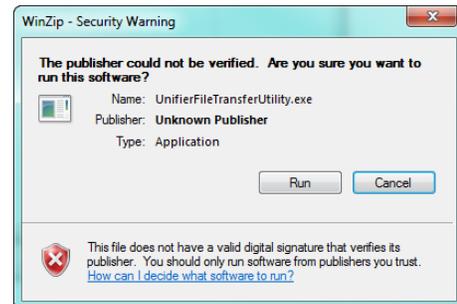
The Advanced File Transfer Option (located under Help>Download Plugins) allows for drag and drop of documents into Unifier. An additional Java plug in must be downloaded for this option to function, which is located in Support under the Download tab.



To install, click the link to download the application required for Advance File Transfer Option. Follow the instructions to Run the Install setup.



Double click the application .zip file, then click Run.



Follow the directions on the screen, until the final window confirms the installation.



## APPENDIX B

### *Initial Schedule Sheet*

The “Initial Schedule” serves multiple purposes. It documents the chronological evolution of the project and reflects the current project schedule. The “Initial Schedule” sheet is used for the Chief’s monthly report, metric based reporting, and pushed to GIS for “construction project status.”

The “Initial Schedule” sheet is created, within the Schedule Manager, when a project is entered into Unifier for the first time.

Columns 1 and 2 are always “ID” and “Activity Name” and do not change.

Columns 3 through 5 (**Start date, Finish date, & Duration**) are the current status of the project.

These are the columns to be reviewed and updated (if necessary) on a monthly basis by the project manager.

“Baseline Schedules” are intended to chronicle the project schedule at a certain period in time.

#### **Baseline Schedule**

Columns 6 through 8 (**Baseline Start, Baseline Finish, & Baseline Duration**) are established when the project is initially entered into Unifier. The purpose of these columns is to chronicle the schedule at the inception of the project. These dates never change.

#### **Baseline 1 Schedule**

Columns 9 through 11 (**Baseline 1 Start, Baseline 1 Finish, & Baseline 1 Duration**) are established at the first milestone of the project, likely at the completion of the PER. As the project is further developed through preliminary engineering, design, and award, the project schedule may change. The “Baseline 1” schedule chronicles the change in project schedule at the first project milestone.

#### **Baseline 2 Schedule**

Columns 12 through 14 (**Baseline 2 Start, Baseline 2 Finish, & Baseline 2 Duration**) are established at the second milestone of the project, likely at the completion of the Design. As the project is further developed through design and award the project schedule may change. The “Baseline 2” schedule chronicles the change in project schedule at the second project milestone.

#### **Baseline 3 Schedule**

Columns 15 through 17 (**Baseline 3 Start, Baseline 3 Finish, & Baseline 3 Duration**) are established at the third milestone of the project, likely at the Notice To Proceed. As the project progresses, the project schedule may change due to a bid delay, a change in CIP priorities, or a construction delay. Subsequent “Baseline #” schedules chronicle changes in the project schedule.

To ensure uniformity in populating the schedule the following term’s durations are generally defined as follows:

**Pre-Planning** = CIP inception until Engineering Services contract award

**PER** = Engineering Services Award until Design Amendment is approved

**Design Delay** =optional

**Design** = Design Amendment approval until Bid Ready documents are received

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**Bid Delay** = optional

**Pre-Construction** = receipt of Bid Ready documents until NTP

**Construction** = NTP until Substantial Completion

**Close Out** = Substantial Completion until Final Completion (final payment)

**Completion** = Final Completion

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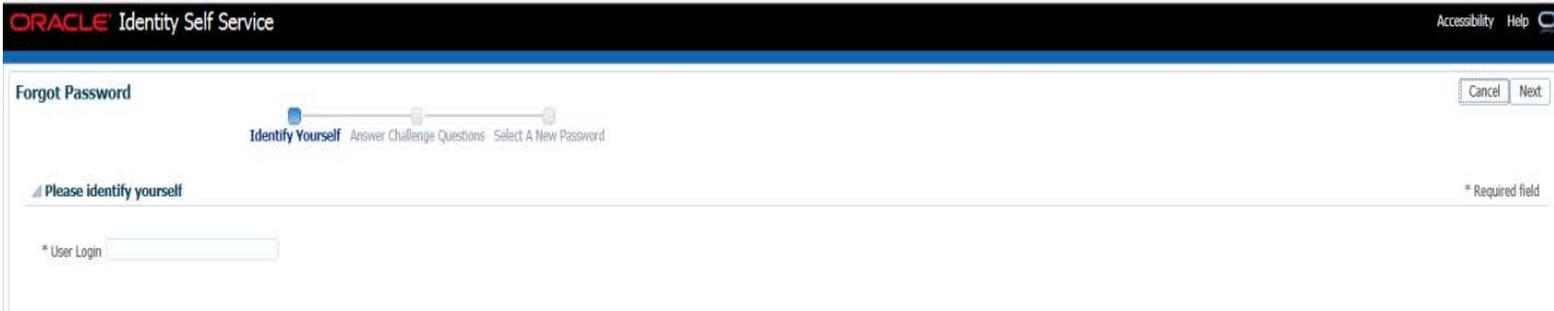
## APPENDIX C

### Unlocking User Account

An attempt to login to Unifier with the wrong password 5 times will lock the user's account and will display a message stating the "account is locked". To unlock the account, follow the instructions below:

1. Choose the Forgot Password workflow and follow the steps to set a new password.

 Your account is locked. You can unlock your account by going to [Forgot Password](#)



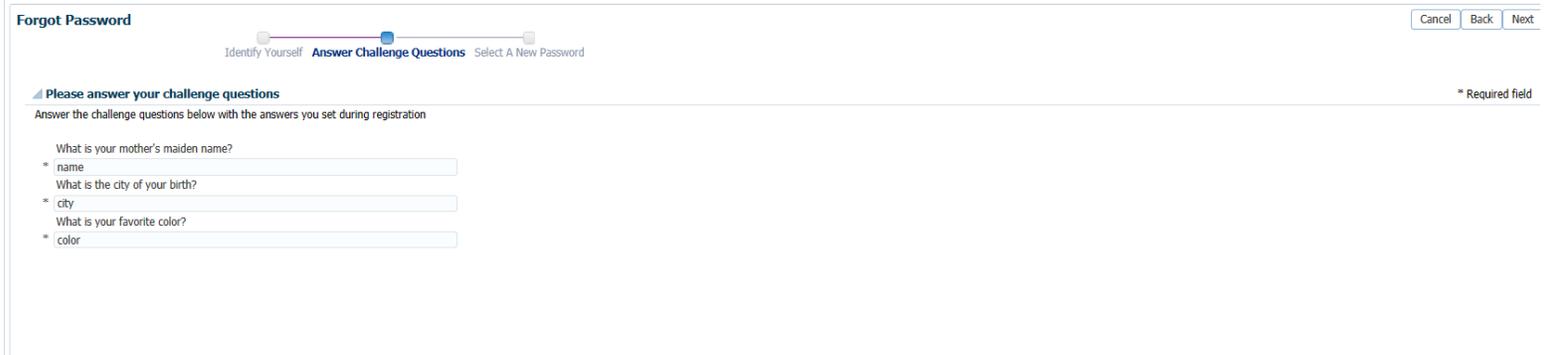
**ORACLE Identity Self Service** Accessibility Help

**Forgot Password** Cancel Next

Identify Yourself Answer Challenge Questions Select A New Password

**Please identify yourself** \* Required field

\* User Login



**Forgot Password** Cancel Back Next

Identify Yourself **Answer Challenge Questions** Select A New Password

**Please answer your challenge questions** \* Required field

Answer the challenge questions below with the answers you set during registration

What is your mother's maiden name?

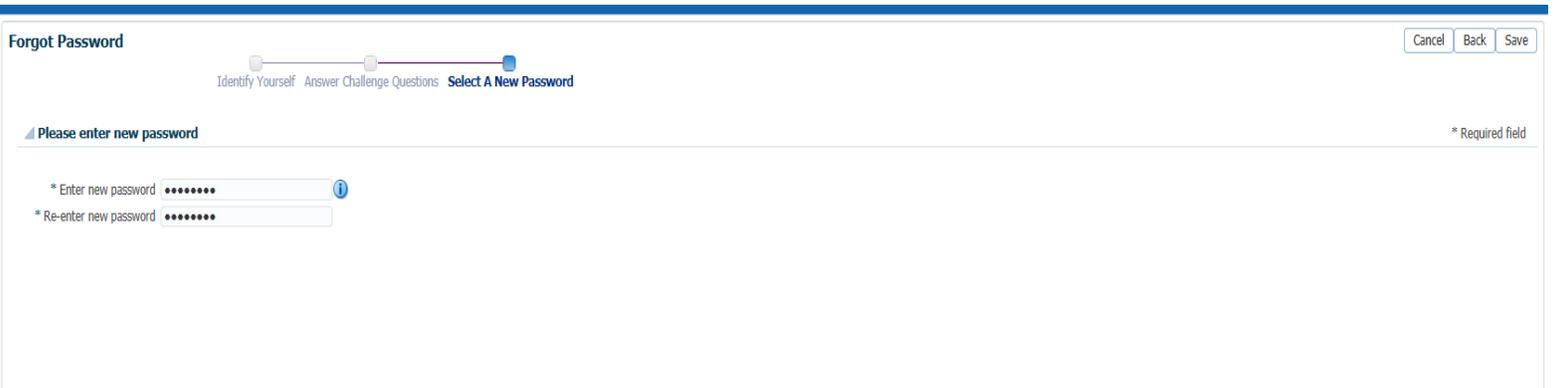
\* name

What is the city of your birth?

\* city

What is your favorite color?

\* color



**Forgot Password** Cancel Back Save

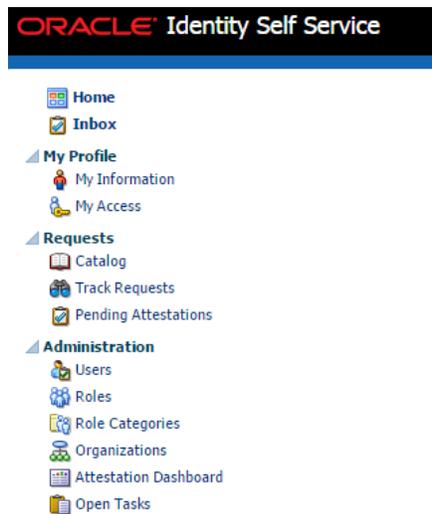
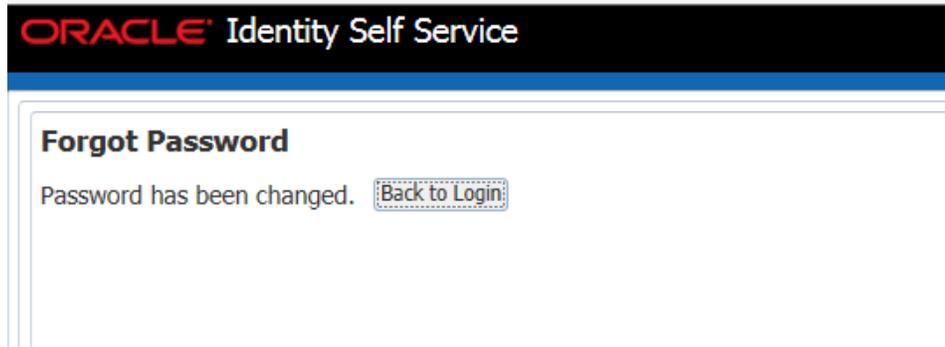
Identify Yourself Answer Challenge Questions **Select A New Password**

**Please enter new password** \* Required field

\* Enter new password  ⓘ

\* Re-enter new password

2. Click on Back to Login. Users may be directed to the Oracle Identity Self Service site instead. In this event, reopen the Unifier login page.



3. Users must wait **FIVE** minutes before trying to login with new password.
4. If the account is still locked, please contact the Unifier Administrator ([UnifierAdmin@hrsd.com](mailto:UnifierAdmin@hrsd.com)).

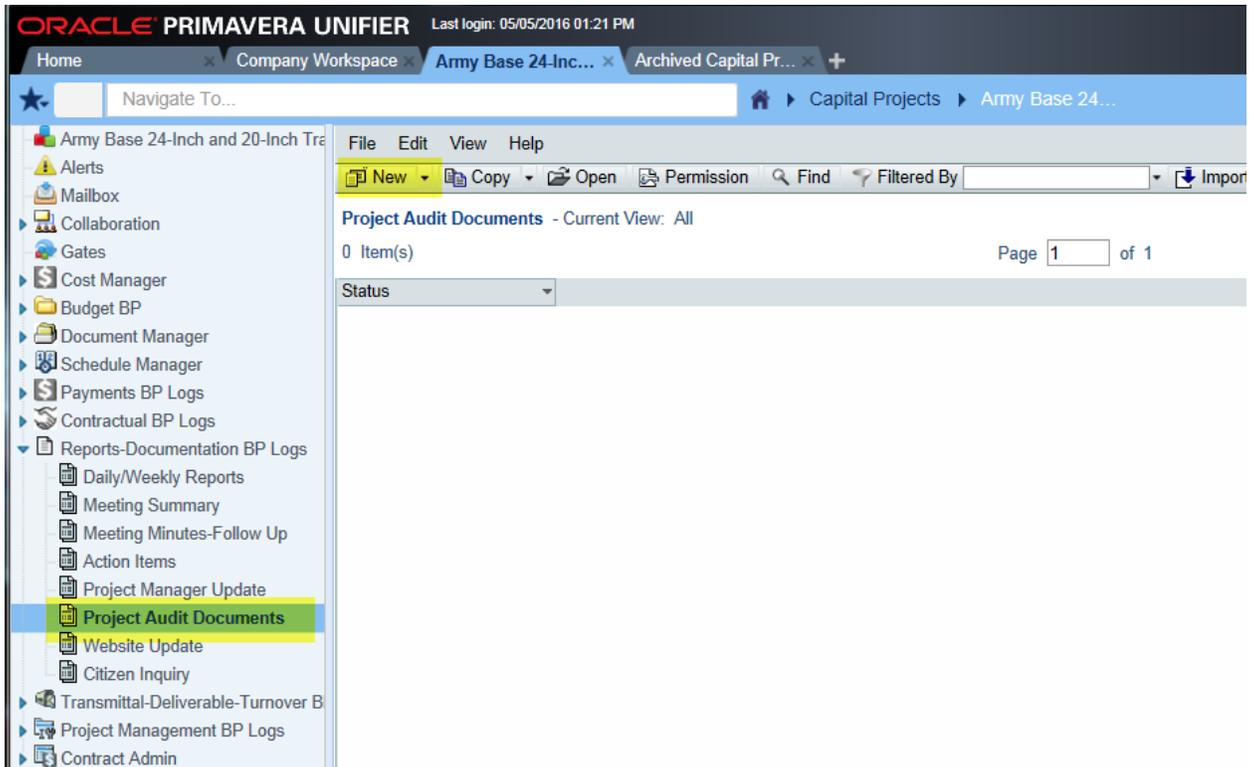
## APPENDIX D

### *Project Audit Documents BP and Gates Module*

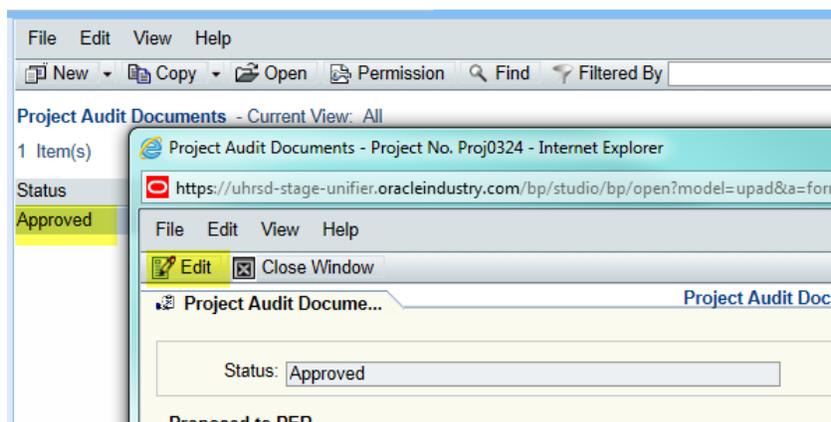
Project Managers will be able to update project phase (formerly project status) by completing the Project Audit Documents BP, which will filter into the Chiefs' monthly reports. The Gates will run daily but can also be manually refreshed within the Gates menu.

#### Project Audit Documents

1. The Project Audit Documents BP is located under the Reports-Documentation BP Logs. Click New to create a log.



**Please note:** The log will only need to be created once. To open once created, double-click on the “Approved” status log and click Edit to update the log.



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- For each document listed within each phase, select Yes, No or N/A (if applicable) from the dropdown options. If No is selected for any of the documents, the Status will **not** change to the next appropriate phase. Select the correct document Location from the dropdown list. The Comment field is available and will be useful for auditors and other users.

The screenshot shows a web browser window titled "Create New Project Audit Documents - Project No. Proj0322 - Internet Explorer". The address bar shows the URL: [https://uhrsd-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upad&a=form.0&b=upad&bp.csvimport=0&project\\_id=83901](https://uhrsd-unifier.oracleindustry.com/bp/studio/bp/checkPermission?model=upad&a=form.0&b=upad&bp.csvimport=0&project_id=83901). The browser window contains a form titled "Project Audit Documents".

The form has a "Status" dropdown menu set to "Approved". Below this, there are sections for "Proposed to Pre Planning" and "Proposed to PER".

The "Proposed to PER" section contains a table of fields:

Field	Location	Comment
Appropriated: -Select-		
Budget: -Select-		
Schedule: -Select-		
Baseline 1: -Select-		
HART Report: Yes (selected)		
Record of Negotiation: No		

The "Record of Negotiation" dropdown menu is open, showing options: Yes, No, and N/A. The "No" option is selected.

Below the "Proposed to PER" section is the "PER to Design" section, which contains a table of fields:

Field	Location	Comment
Preliminary Engineering Report-Final: -Select-		
Record of Negotiation: -Select-		
Cost Schedule: -Select-		
Risk Report-Draft: -Select-		

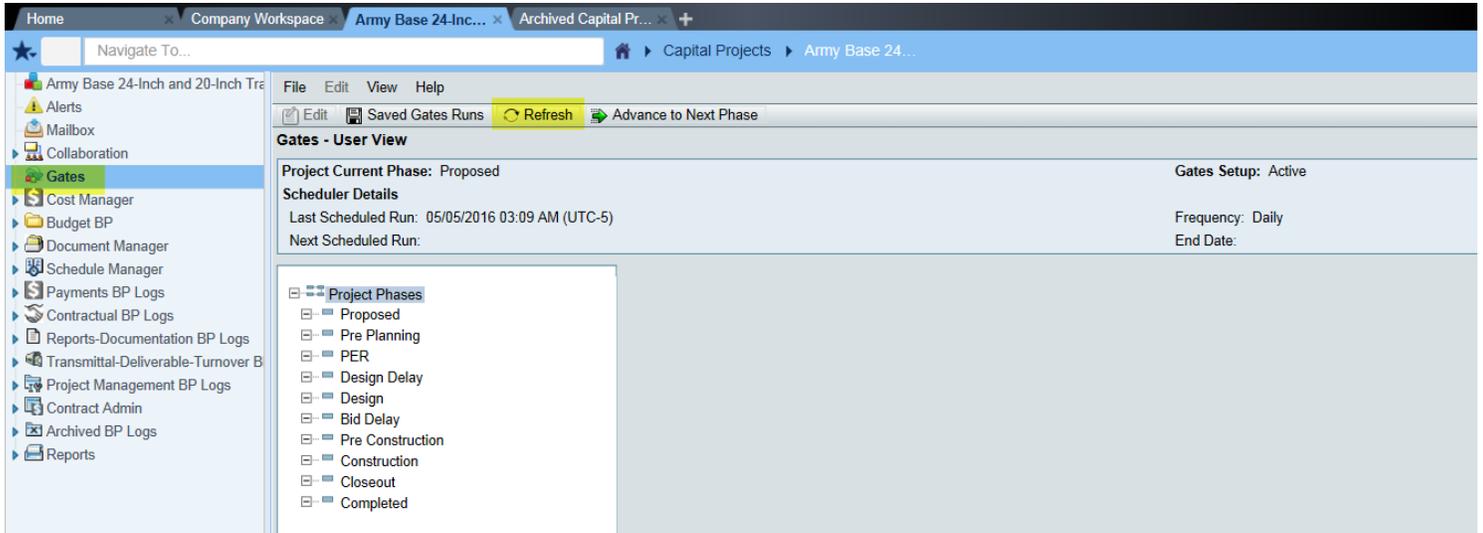
At the bottom of the form, there are four tabs: "Attachments (0)", "Linked Records (0)", "General Comments", and "Linked Mail (0)".

- Once, editing is complete, click on Finish Editing to save the changes.
- The Gates will run daily and the project phase will be updated at that time. To manually refresh the Gates, please see below.

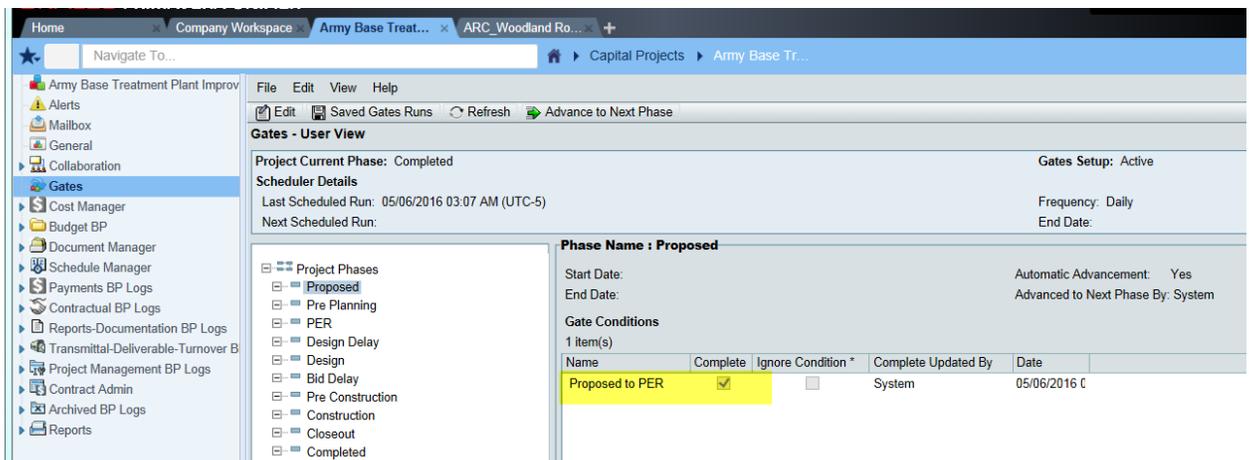
## Gates Refresh

- To manually refresh the Gates to move to the next phase, select Gates from the left menu, and then click on Refresh. **Do not click on Advance to Next Phase.**

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2. Each phase will have a check mark when the phase is Complete.



3. To check the current Phase, open the Details form and select Options.

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