

*Unifier™*  
*User Training Guide*

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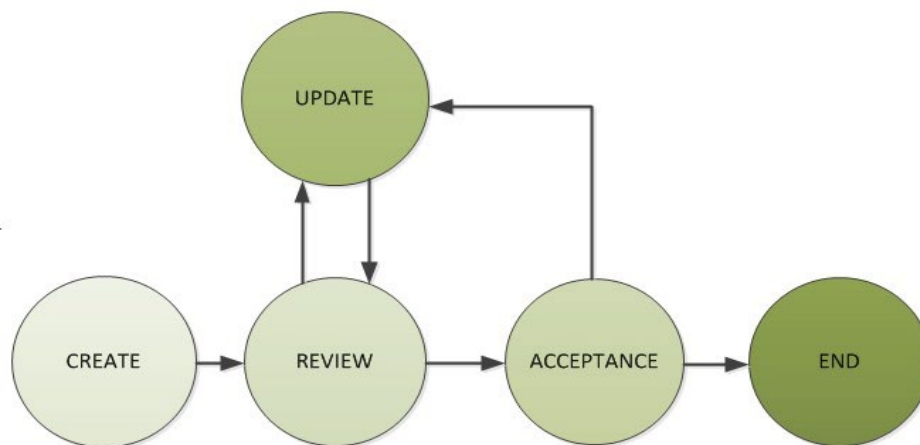
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## Introduction

Oracle's Primavera Unifier™ provides the means to optimize business processes and allows transparency to enable its stakeholders' better management of all the information required to successfully manage their construction projects.

Unifier™ is designed to help owners manage the flow of information in projects, providing an automated collaborative environment. It provides real-time visibility and accountability resulting in faster, accurate reporting and decision making.

Unifier™ lets you automate your business processes and track and manage information. Attachments and comments from assignees are captured and archived as the project records flow through the system. Unifier™ processes information through records, which have steps in a workflow (see generic example below). Team members are assigned to tasks to add information or comment on records.



## Setup Unifier™ (First Time User Guide)

Before using Unifier™ users must configure their browser settings, set up document view options and other important information.

Users can use Primavera Unifier™ with the following supported browsers:

- **Microsoft Edge, Mozilla Firefox, Google Chrome, Apple Safari**

For additional information on browsers, use the link below.

[https://docs.oracle.com/cd/F37375\\_01/English/User\\_Guides/user\\_general/helpmain.htm?toc.htm?10281957.htm](https://docs.oracle.com/cd/F37375_01/English/User_Guides/user_general/helpmain.htm?toc.htm?10281957.htm)

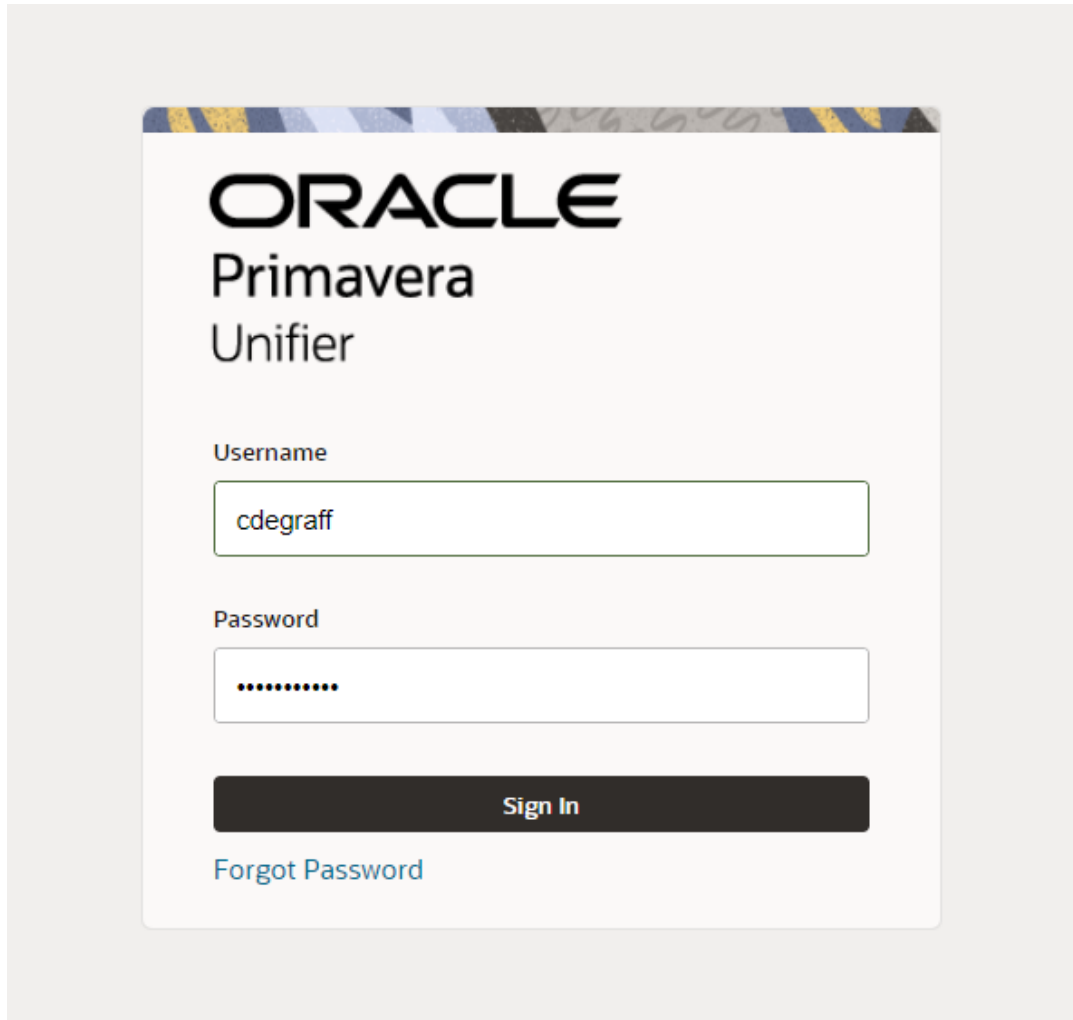
*To improve Unifier™ performance, make sure the browser settings match the following:*

Ensure that the security settings for the Internet zone is set as **Medium** or **Medium-High**. If the internet settings are customized, contact your IT for more information. When finished, sign out of Unifier™ and close the browser completely in order for the new settings to take effect.

## Access Unifier™

To access Unifier™, go to: <https://unifier.deldot.gov>

Once there, enter your username and password in the fields and press the **Sign In** button.



**ORACLE**  
Primavera  
Unifier

Username  
cdegraff


Password  
.....

**Sign In**

[Forgot Password](#)

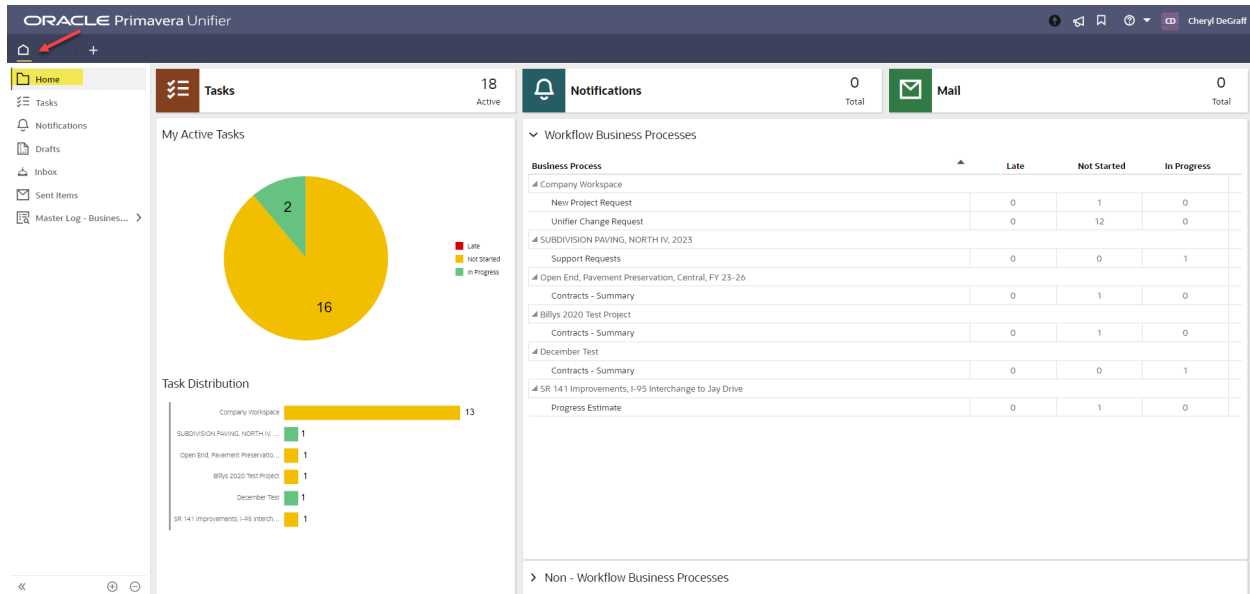
If you have trouble logging in:

- Be sure the correct Username and Password is entered as given by your Administrator.
- Check the Caps Lock key on the computer; **Username and Passwords are case sensitive.**
- If more assistance is needed, contact the Company Administrator.

 **Tip:** Save work often. If a user is inactive in Unifier™ for longer than the timeout limit (usually one hour), the system will log the user out automatically, and any unsaved work may be lost.

## User Home Page

When first logged into Unifier™, users are directed to the User Home Page.



From the User Home page, users can:

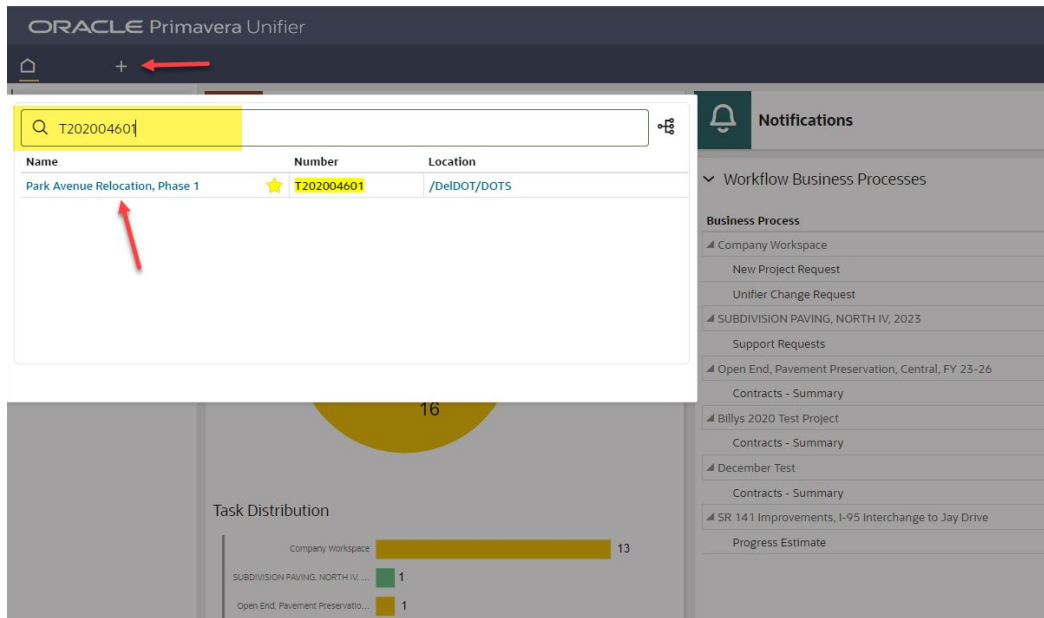
- Assess Unifier™ functions using the Navigator.
- View all assigned Tasks and Drafts records.

**Note:** To sign out of Unifier™, click on your name in the upper right-corner of the Unifier™ window and then select Sign Out.

## Navigation Overview

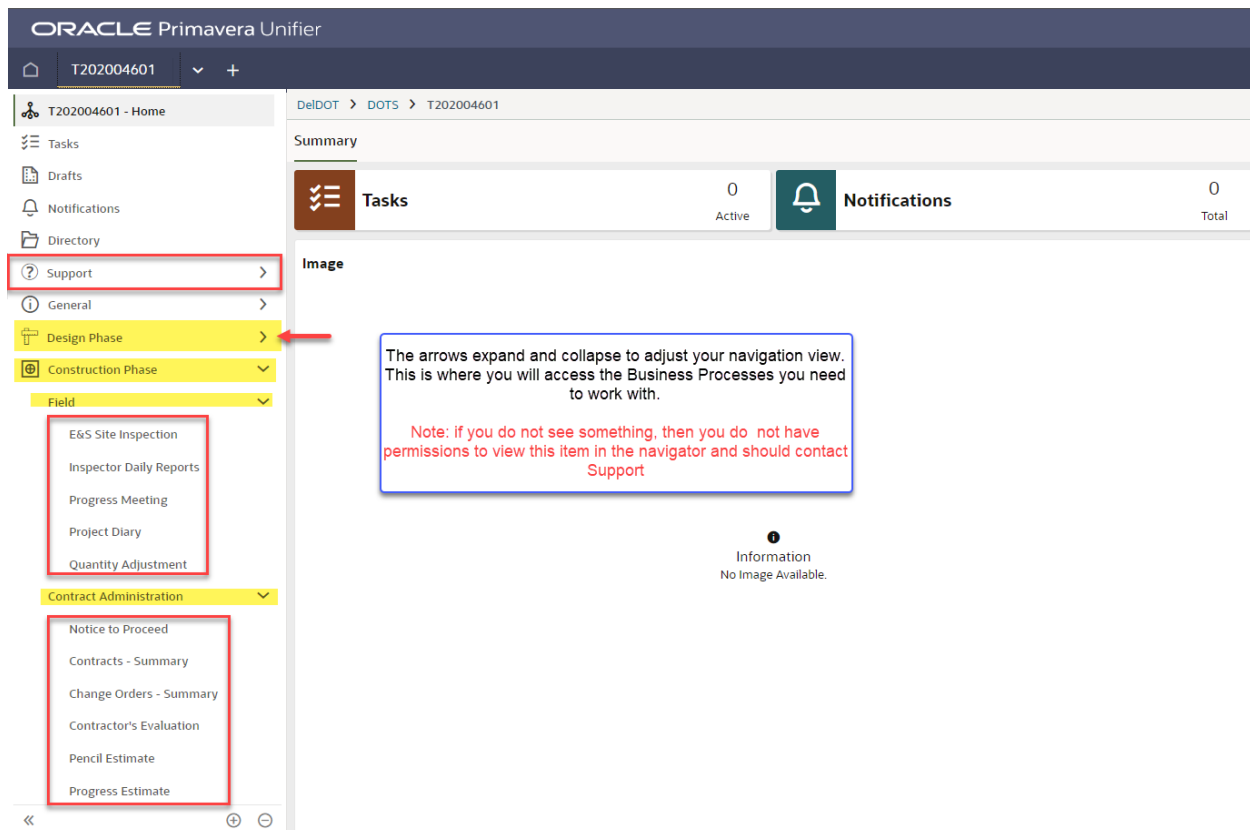
### Open a project

Navigate to any project by selecting the Plus (+) icon near the Home icon. This will bring up the search bar. Enter the name or number of the project you need. The Name is a hyper-link, click it and it will take you to the project home page.



### Navigating within a project

Navigation in Unifier™ is easy. The Navigator is like a familiar folder system, much like MS Explorer folders. Users can access the desired Business Processes from Design Phase and Construction Phase folders.



## Viewing a record

By clicking on an individual record from the selected Business Process log, an overview of the record will appear to the right of the viewing screen (make sure to open the right-hand viewing screen by selecting the three dots).

The screenshot shows the Oracle Primavera Unifier interface. The main content area displays a table titled "Inspector Daily Reports". The table has columns for Record #, Status, Creator, Daily Activity Date, Location Name, Critical?, and Remarks. A red box highlights the record with IDR-00946, which is in "For\_Review" status, created by Dan McGettigan on 06/06/2023. A red arrow points to the three-dot menu icon on the right side of the table row.

Record #	Status	Creator	Daily Activity Date	Location Name	Critical?	Remarks
IDR-00945	For_Review	William Kirsch	06/06/2023		<input type="checkbox"/>	Haul topsoil off site from prior BMP 766 stockpile. Form and pour round about vertical/...
IDR-00947	For_Review	Rick Tracy	06/06/2023		<input type="checkbox"/>	T202004601 Park Ave Relocation Phase 2 Park Avenue, and Route 9 Georgetown Delaw...
IDR-00949	For_Review	Matthew Sterling	06/06/2023		<input type="checkbox"/>	7:00 Myers crew on site hauling material from BMP 765 stockpile, 768 stockpile, and 76...
IDR-00946	For_Review	Dan McGettigan	06/06/2023		<input type="checkbox"/>	Oversee project at various locations and assist with quantity measurements. See all othe...
IDR-00948	For_Review	David Fake	06/06/2023		<input type="checkbox"/>	7:30 BW Electric on-site to install a Service Run (SR-103) that connect from Junction W...
IDR-00939	Approved	William Kirsch	06/05/2023		<input type="checkbox"/>	Haul topsoil off site from prior BMP 766 stockpile. Form and pour round about vertical/...
IDR-00943	Approved	Matthew Sterling	06/05/2023		<input type="checkbox"/>	7:00 Myers crew onsite, hauling Topsoil from BMP 766 stockpile to off site location. Haul...
IDR-00940	Approved	Dan McGettigan	06/05/2023		<input type="checkbox"/>	Oversee project at various locations and assist with quantity measurements. See all othe...
IDR-00942	Approved	David Fake	06/05/2023		<input type="checkbox"/>	9:30 SMI on-site to seed and blanket South Roundabout. 3:00 SMI completes seeding/e...
IDR-00941	Approved	Steve Wiedorfer	06/05/2023		<input type="checkbox"/>	0700 - Allan Myers on site 0700 - Jaquez Concrete on site 0730 - Start forming up for c...
IDR-00941	Approved	Rick Tracy	06/05/2023		<input type="checkbox"/>	T202004601 Park Ave Relocation Phase 2 Park Avenue, and Route 9 Georgetown Delaw...
IDR-00938	Approved	Dan McGettigan	06/04/2023		<input type="checkbox"/>	Report for weather and MOT only.
IDR-00937	Approved	Dan McGettigan	06/03/2023		<input type="checkbox"/>	Report for weather and MOT only.
IDR-00934	Approved	Matthew Sterling	06/02/2023		<input type="checkbox"/>	7:00 crew onsite hauling material from stockpile from BMP 765. Jesse, Dave, and Rob...
IDR-00935	Approved	David Fake	06/02/2023		<input type="checkbox"/>	Performed site-wide E6S inspection with Jesse Baird.
IDR-00932	Approved	Rick Tracy	06/02/2023		<input type="checkbox"/>	T202004601 Park Ave Relocation Phase 2 Park Avenue, and Route 9, Georgetown, Dela...
IDR-00933	Approved	William Kirsch	06/02/2023		<input type="checkbox"/>	Park Ave dewatering, haul excavated material from BMP 768 off site.
IDR-00936	Approved	Steve Wiedorfer	06/02/2023		<input type="checkbox"/>	0700 - Allan Myers on site 0730 - Started hauling away stockpiled material previously e...
IDR-00928	Approved	William Kirsch	06/01/2023		<input type="checkbox"/>	Park Ave dewatering, haul excavated material from BMP 768 off site.
IDR-00930	Approved	Steve Wiedorfer	06/01/2023		<input type="checkbox"/>	0700 - Inspector on site 0730 - Received call from Wayne Massey requesting that inspe...
IDR-00923	Approved	Matthew Sterling	06/01/2023		<input type="checkbox"/>	7:00 crew onsite hauling material from BMP 766 to offsite location. Stockpiled material...

## Opening a Record

The screenshot shows the Oracle Primavera Unifier interface. The main content area displays a table titled "Inspector Daily Reports". A red box highlights the record with IDR-00946. Another red box highlights the three-dot menu icon on the right side of the table row. A separate window titled "Record Details" is open on the right, showing information for the selected record.

Record #	Status	Creator	Daily Activity Date	Location Name	Critical?
IDR-00946	For_Review	Dan McGettigan	06/06/2023		<input type="checkbox"/>

**Record Details** | Workflow Progress | Attachments

**General**

Contract Reference: T202004601 | Record No.: IDR-00946

Project Number: T202004601 | Creation Date: 06/06/2023 01:29 PM

Project Name: Park Avenue Relocation, Phase 1 | Status: For\_Review

Spec Year: 2016 | Due Date:

First Chargeable Day:

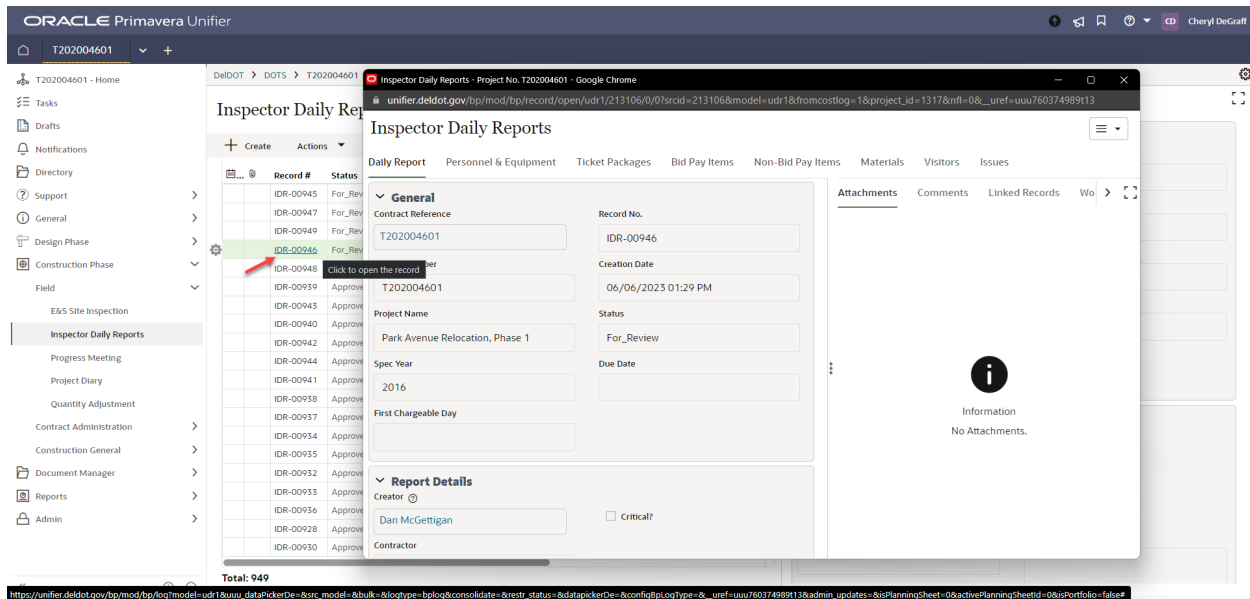
**Report Details**

Creator: Dan McGettigan | Critical?:

Contractor: Allan Myers MD Inc

Project Location:

To open the actual record, double click on the record, or click on the record number hyperlink.



## Tabs in Unifier

Unifier™ uses a tab-based navigation system. There are three ways to navigate through projects in Unifier™ and each are separated into individual tabs. Home, Company Workspace and Project.

### Home

Overall summary of all:

- Oracle issued announcements
- Tasks requiring attention

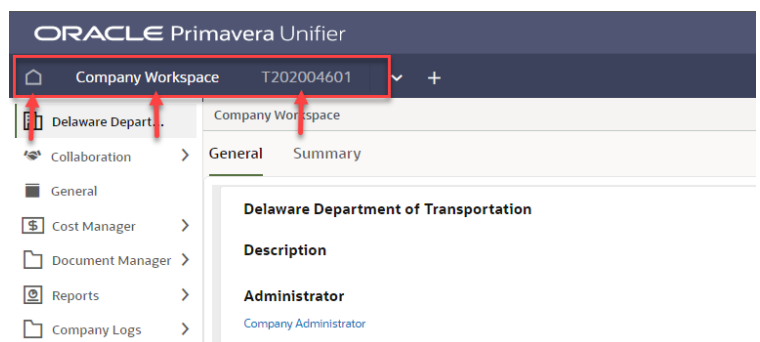
### Company Workspace

These are Company specific activities such as:

- Company Business processes
- Unifier™ Administration

### Project Level

- BPs and Document Manager
- Cost Sheet and Schedule of Values



## Home Tab

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



Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
SUBDIVISION PAVING, NORTH IV, 2023	Support Requests	SR-0016	Document Mana...		Cheryl DeGraff, D...	Complete Request		06/06/2023 01:...	Support Request - Admin v...
	New Project Requ...	NPR-0197			John Gaines, Del...	Company Admin ...		06/06/2023 09:...	New Project Request WF
	Unifier Change R...	UCR-0025	Statements - Newr		Cheryl DeGraff, D...	Request Review		06/06/2023 07:...	Unifier Change Request v2.C
	Unifier Change R...	UCR-0024	Project Info Dash...		Cheryl DeGraff, D...	Request Review		06/06/2023 07:...	Unifier Change Request v2.C
SR 141 Improvements, I-95 Interchange to Jay Drive	Progress Estimate	PE-0052	045		Doug Marx, DelDOT	WS Import		06/05/2023 12:...	Progress Estimate WF (WS ...
	Unifier Change R...	UCR-0022	CC List Solution		Cheryl DeGraff, D...	Request Review		06/05/2023 08:...	Unifier Change Request v2.C
	Unifier Change R...	UCR-0021	PSE Process		Cheryl DeGraff, D...	Request Review		06/05/2023 08:...	Unifier Change Request v2.C

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

Tip: Save all work before clicking the “Home” button, as any unsaved work will be lost.

### Company Workspace Tab

The Company Workspace Tab is primarily used for administration of the Unifier™ program. New Project Request, Unifier Change Request and Vendors business processes (BPs) are in Company Workspace.

**ORACLE Primavera Unifier**

Company Workspace T202004601

Delaware Department of Transportati... | Company Workspace

Collaboration > | General Summary

General

Cost Manager >

Document Manager >

Reports >

Company Logs >

**Delaware Department of Transportation**

**Description**

**Administrator**  
Company Administrator

**Homepage url**

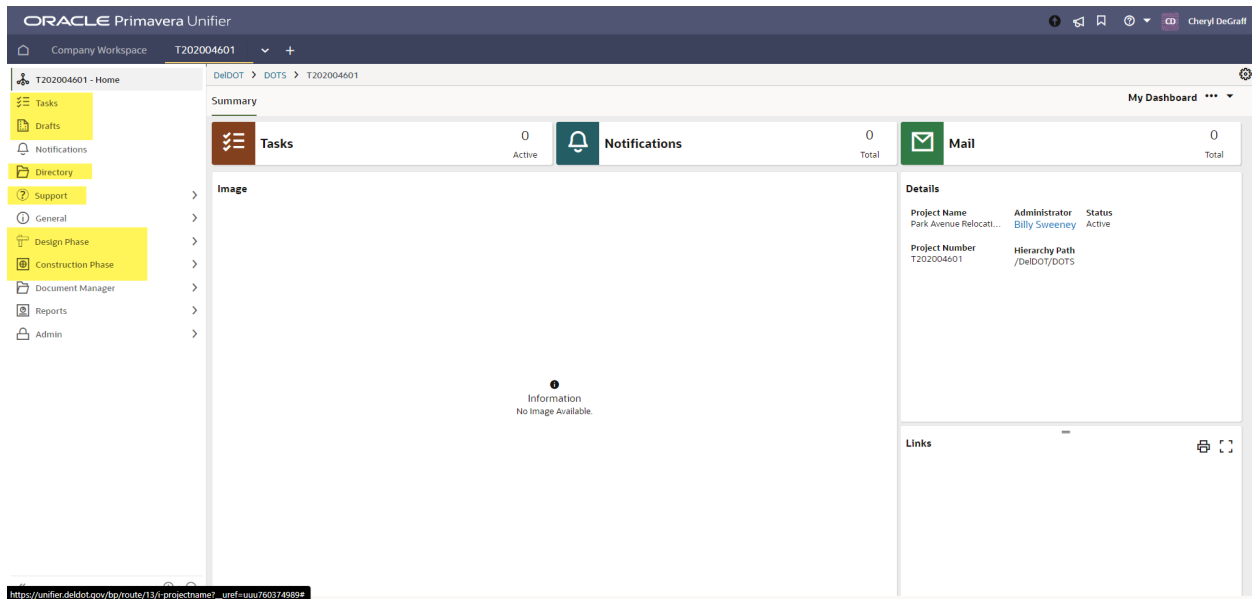
**Help url**  
[https://www.youtube.com/playlist?list=PLZrnWsoNR9WQJ\\_UVaeKnmpYsek10IWMQe](https://www.youtube.com/playlist?list=PLZrnWsoNR9WQJ_UVaeKnmpYsek10IWMQe)

**BPs fall under Company Logs**

### Project Level Tab

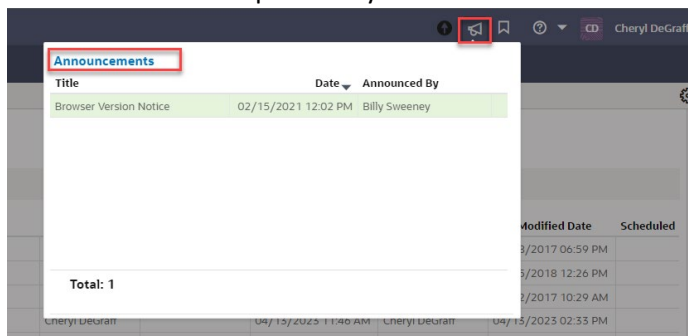
Project related details are listed in this tab such as:

- Project Name and Project Number
- Summary of Action Items Requiring Your Attention specific to this Project (e.g. Tasks and Draft Records)

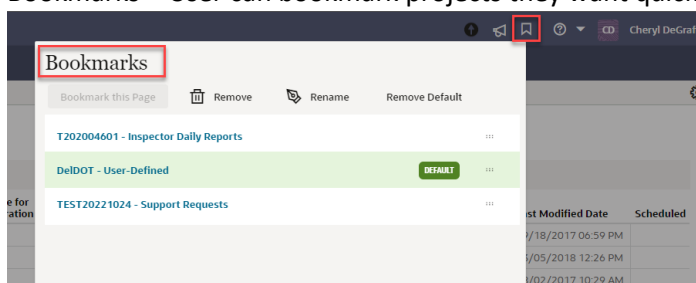


## User Toolbar Icons

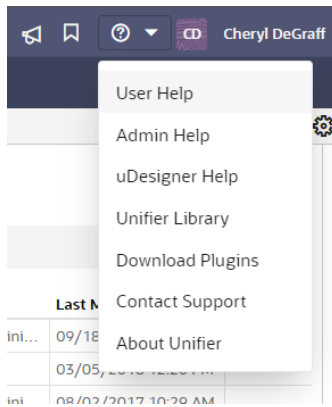
- Announcements are put out by the Administrator to alert users to changes and updates.



- Bookmarks – User can bookmark projects they want quick access too.

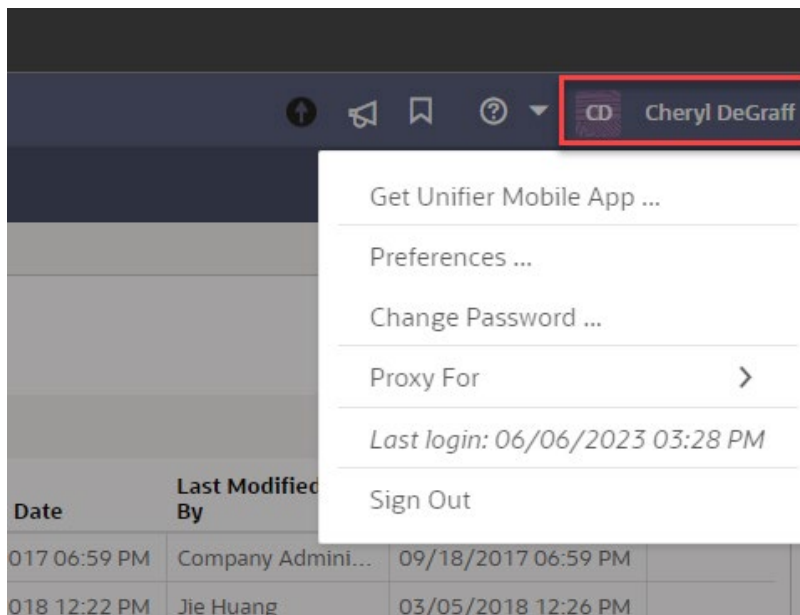


- Help – Give users access to link for assistance with Unifier.



## User Preferences, Password and Proxy

By clicking on your username in the upper right corner of the screen, you can access links that allow you to manage your Preferences, Passwords and Proxy.



The Preferences window displays the following Tabs:

- General - Use this tab to view/edit contact information.
- Security - Use this tab for password management
- Options - Use this tab to manage file transfer and file viewer options.
- Region Format – Use this tab to set time zone, date and other formats.
- Proxy - Use this tab to designate a proxy user.
- More - Use this tab for setting your Viewer options.

## General Tab

In the General Tab, users can view their Contact Information. If the information is incorrect, please contact the Unifier™ Administrator and provide the correct information.

**Preferences**

General Security Email Subscription Region Format Proxy More

Contact Information as in Company Directory

<b>First Name</b> Cheryl	<b>Last Name</b> DeGraff
<b>Title</b> Consultant	<b>Email</b> cdegraff@jmt.com
<b>Work Phone</b>	<b>Mobile Phone</b>
<b>Home Phone</b>	<b>Pager</b>
<b>Fax</b>	<b>Address-1</b>
<b>Address-2</b>	<b>Address-3</b>
<b>City</b>	<b>State/Province</b>

**Security Tab**

In the Security Tab, users can manage their password and security questions. Please ensure that you have security questions setup so that you can reset your password on your own if needed.

**Preferences**

General Security Email Subscription Region Format Proxy More

**Change Password**

Current Password

?

New Password

Confirm Password

**Password recovery secret questions**

Question 1: \*

What was the color of your first car?

Answer

Question 2: \*

What was your first pet's name?

Answer

Question 3: \*

In what city was your mother born?

Answer

Cancel Apply OK

## Email Subscription Tab

The Email Subscription option enables users to control the number, type and frequency of Unifier™ related email notifications received. Users can “opt in” or “opt out” of receiving email notifications for specific events within Unifier™. Users also have the option of receiving all their Unifier™ email notifications once a day in an email digest, or one at a time in separate email messages.

Users can choose the modules and events for which they want to receive email notifications. By selecting a checkbox, a user is “subscribing” to email notifications for that specific event. If a checkbox is not selected, then the user will not receive any email messages regarding that event.

Users can also check the box for **Send notifications in single daily digest** which consolidates email notifications. The consolidated email contains the content from the selected events. Users will get a single email instead of an email for each occurrence of selected events.

### Preferences

General Security **Email Subscription** Region Format Proxy More

Email Subscription

Send notifications in single daily digest

<p><b>Workflow Business Processes</b></p> <p><input checked="" type="checkbox"/> Personal tasks</p> <p><input checked="" type="checkbox"/> Decline tasks</p> <p><input checked="" type="checkbox"/> Overdue personal tasks</p> <p><input checked="" type="checkbox"/> Messages</p> <p><input type="checkbox"/> Discussion group comments</p> <p><input type="checkbox"/> Record workflow complete</p> <p><input type="checkbox"/> Record Modification</p> <p><b>Non Workflow Business Processes</b></p> <p><input checked="" type="checkbox"/> Record Creation</p> <p><input type="checkbox"/> Record Modification</p>	<p><b>Document Manager - Project/Shell</b></p> <p><input type="checkbox"/> Document upload</p> <p><input type="checkbox"/> Transfer ownership</p> <p><input type="checkbox"/> Move</p> <p><input type="checkbox"/> Delete</p> <p><input type="checkbox"/> Document revise</p> <p><input type="checkbox"/> Folder rename</p> <p><b>Document Manager - Company</b></p> <p><input type="checkbox"/> Document upload</p> <p><input type="checkbox"/> Transfer ownership</p> <p><input type="checkbox"/> Move</p>	<p><b>Mailbox</b></p> <p><input checked="" type="checkbox"/> Personal Mail</p> <p><b>User Defined Reports</b></p> <p><input checked="" type="checkbox"/> New report granted</p> <p><input checked="" type="checkbox"/> Results from scheduled reports</p> <p><b>Alerts</b></p> <p><input checked="" type="checkbox"/> Each alert</p> <p><b>Gates</b></p> <p><input type="checkbox"/> Change Phase Notification</p> <p><input type="checkbox"/> Auto- email PDF Gates run</p> <p><b>Project/Shell</b></p>
--	--	--

The email notification will look similar to the one pictured below:

This is a system-generated e-mail message. Do not reply to sender.

**Project/Shell: Admin Test - T05102023**

You have been copied on Project Letting PRJLET-0003.

From : **Karynn Reed**  
 Sent For : **Bids Under Review**

Source Name : **Admin Test - T05102023**  
 Record No : **Project Letting PRJLET-0003**  
 Title :

**Unifier Login**

For Oracle technical assistance <http://www.oracle.com/us/support>

## Region/Format Tab

Use this tab to manage settings such as: Language, Time Zone, Date Format, and Number and Currency Formats.

### Preferences

General Security Email Subscription **Region Format** Proxy More

Language, date and time format

Preferred Region  
 Select

Language  
 English

Time Zone  
 (UTC-06:00) Central Time (US & C...)

Date Format  
 MM/DD/YYYY HH:MM AM

for example 07/23/2014 09:01 PM

Number and Currency format

Decimal  
 .

Digit Grouping Symbol  
 ,

Digit Grouping  
 123,456,789

Show Currency Symbol

Positive Currency Format  
 #123

Negative Currency Format  
 (#123)

Negative Number Format  
 -123

Currency Example

Positive	Negative
#123,456.99	(#123,456.99)

Decimal Number Example

Positive	Negative
123,456.99999999	-123,456.99999999

Integer Number Example

Positive	Negative
123,456	-123,456

Cancel **Apply** **OK**

## Proxy Tab

This feature allows users to designate another user as their Proxy User. Proxy Users can be granted permission to access the user's account to complete tasks and perform other functions on their behalf if they are unavailable, such as on vacation. Both the original user and the Proxy User must be members of the same company. To add user as your proxy, click on plus icon (+) and select a user from the list.


### Preferences

General Security Email Subscription Region Format **Proxy** More

Do not allow Proxies

**My Proxy** I am Proxy Proxy Login History

Users who can act as my Proxy


**+** 

Name	Email	Company	Proxy Status
Kyle Pickett	kpickett@jmt.com	Delaware Department of Transp...	Active
Prath Mehta	prathmesh.mehta@delaware.gov	Delaware Department of Transp...	Active


**Proxy User** ×

Proxy User Settings


Grant Proxy Access To \*

Type a User Name... 

Start Date/Time

MM/DD/YYYY HH:MM AM 

End Date/Time

MM/DD/YYYY HH:MM AM 

Status

Inactive  Active

Cancel OK

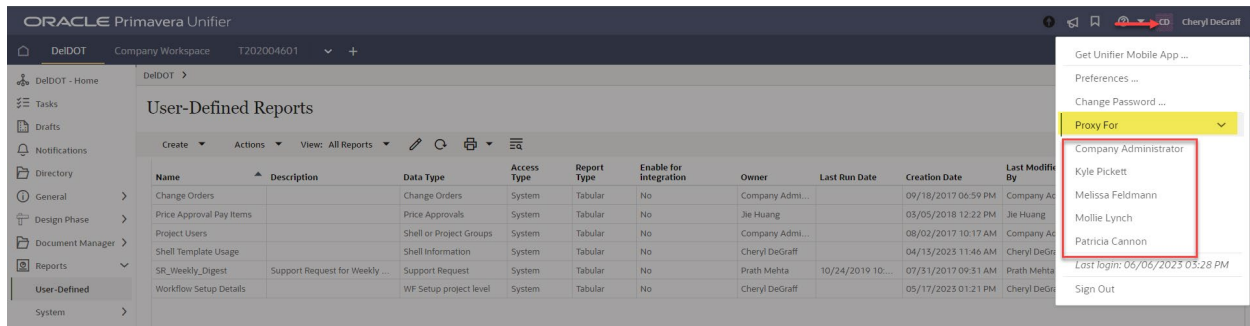
Cancel **Apply** **OK**

Choose a Proxy User carefully. Remember that when another person logs on as your Proxy User, that person will have access to all of the records and functions that you do. The only restriction on a Proxy User logged onto your account is that they cannot change your Preference settings. Audit logs reflect that actions taken by a Proxy User are "on behalf of" the original user.

Users can limit the period in which the Proxy User will have access to their account by specifying a start and end date, or leave their access active indefinitely.

### Act as Proxy User

Users that have been designated as a Proxy User for another user will have their name listed in the **Proxy For** menu. Click on Proxy For and select the user from the drop-down list. Be aware that selected Proxy User cannot change the original user's Preference settings (including their password), and cannot alter the user's permission settings, even if the original user has administration permissions to do so.



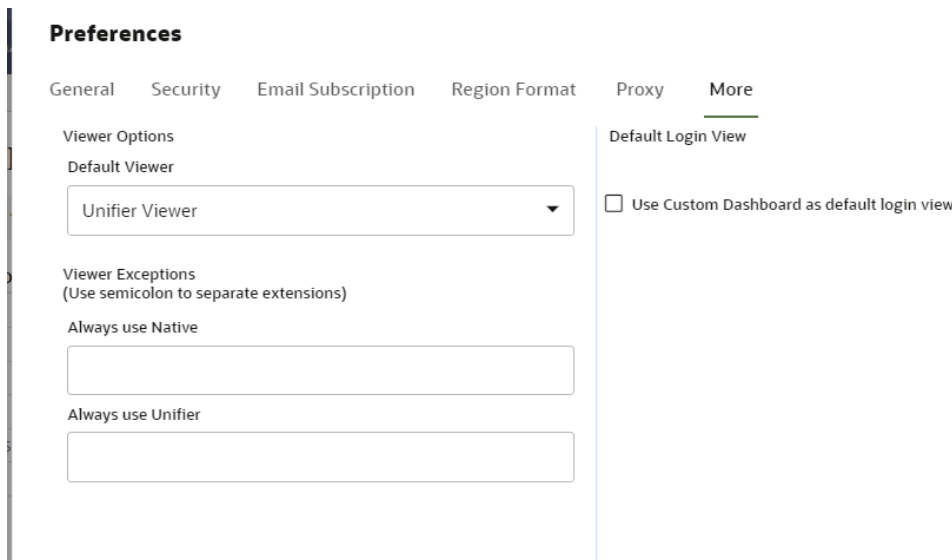
## More Tab

The Default Viewer options affects how Unifier™ displays files (such as documents or drawings), which are attached to business processes or stored in the Document Management System.

Users can choose from the following two viewer options:

**Native:** Documents are opened for viewing in the application used to create them. For example, Microsoft Word documents are opened in Microsoft Word. This option requires that users have the native application installed on their computer in order to view the document.

**Unifier Viewer:** Documents are displayed in the Unifier application in a viewer which can display virtually any type of file. Documents are opened in a read-only view that supports adding graphical mark ups and text comments.



## About Permissions

Each project member has certain roles to play on a project. Access to records, reports and the cost information will be granted, via permissions, depending on that role. As a result, each project member's Unifier™ may look different because of this.

**Note:** If you do not have proper permissions to a feature or business process, it will NOT show up on the Navigator for you.

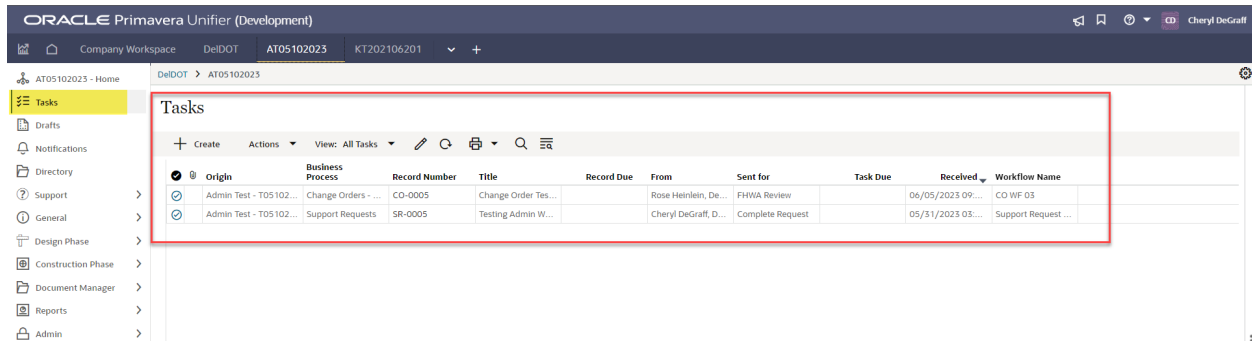


## Tasks and Drafts

In the Navigator of a project, there are two logs: Tasks and Drafts.

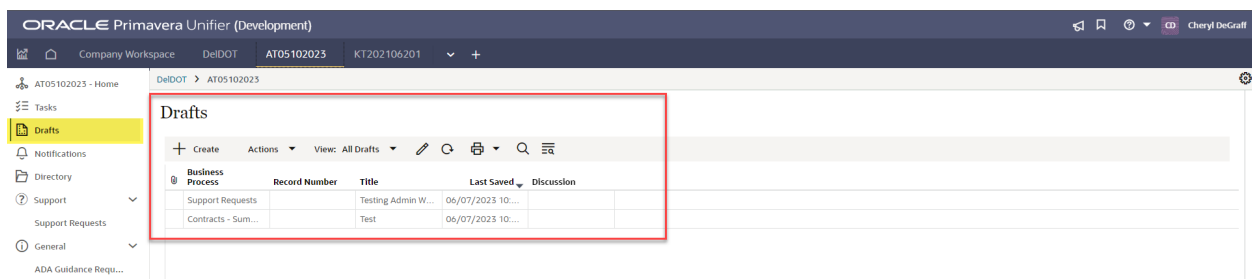
### Tasks Log

Displays all tasks assigned to the logged-in user. The Tasks Log acts as a “To Do” list. If the user’s attention is needed as part of a record, it will appear on the Task Log, and remain there until the task is finished. Users will also receive an email notification when they have a new task. New task items will appear in **BOLD**. Previously viewed but yet- to- be completed tasks remain in normal font.



### Drafts Log

Users can save a copy of any record they created or are responding to. These will be listed in the Draft Log.



## Sort Records in Logs

Open the desired business process and click any of the column headers to sort by that column. In the example below, Purchase Orders are sorted by descending record number.

ORACLE Primavera Unifier (Development)

Company Workspace DelDOT AT05102023 T202106201

DelDOT > DOTS > T202106201

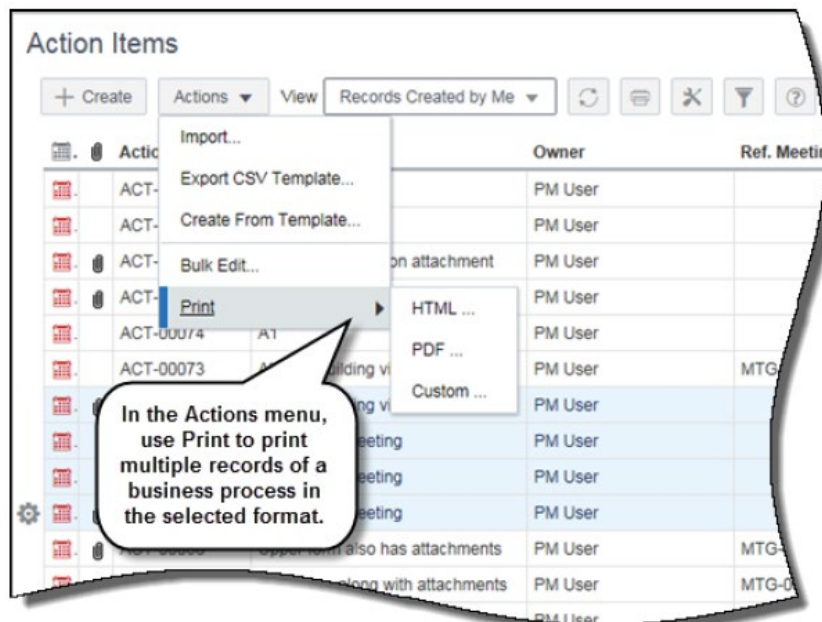
### Inspector Daily Reports

Actions View: All Records (No Grouping)

Record #	Status	Creator	Daily Activity Date	Location Name	Critical?	Remarks
IDR-00013	For_Review	Kyle Pickett	03/24/2023		<input type="checkbox"/>	
IDR-00012	Approved	Rose Heinlein	03/15/2023		<input type="checkbox"/>	
IDR-00011	Approved	Rose Heinlein	03/15/2023		<input type="checkbox"/>	
IDR-00010	Tkt_Pkg_Review	Lim Tan	02/01/2023		<input type="checkbox"/>	
IDR-00009	Terminated	Lim Tan	01/31/2023		<input type="checkbox"/>	
IDR-00008	Terminated	Lim Tan	12/21/2022		<input type="checkbox"/>	
IDR-00007	Approved	Lim Tan	12/15/2022		<input type="checkbox"/>	
IDR-00006	Terminated	Lim Tan	12/01/2022		<input type="checkbox"/>	
IDR-00005	Approved	Lim Tan	12/01/2022		<input type="checkbox"/>	
IDR-00004	Terminated	Lim Tan	11/30/2022		<input type="checkbox"/>	
IDR-00003	Terminated	Lim Tan	11/21/2022		<input type="checkbox"/>	
IDR-00002	Approved	Craig Blowers	09/13/2022		<input type="checkbox"/>	
IDR-00001	Approved	Craig Blowers	08/15/2022		<input type="checkbox"/>	

## Printing Items in the Record Logs

**Print multiple records in Tasks, Business Process and Master logs.** First, select records --they must be of the same business process type in Tasks logs. Select a print format on the Actions menu and then print multiple records in HTML, PDF and Custom formats. You can print up to 100 records at a time.



## Two Phases of a Task

There are two phases in the process of responding to a task.

### Review Phase

The Review Phase allows users to look at record information prior to accepting the task.

**Support Requests**

Support Requests

**Request Details**

Title: Testing Admin Workflow  
 Priority: High  
 Request Type: Business Process  
 Business Process: Unifier Change Request  
 Requested By: Cheryl DeGraff  
 Browser: Google Chrome - PC

**Request Description**

Please provide as much detail for the description as possible. Please be sure to attach any applicable screen shots, Ex: Error or Alert messages, forms, workflows or logs, etc.

Description: Testing the SR Admin workflow to see if UCR will auto-create

**Assignment Details**

Assigned To: Cheryl DeGraff  
 Assigned Date: 05/11/2023  
 Disposition: Resolved  
 UCR Needed?: Yes

**Request Resolution**

Attachments | Comments | Linked Records | Linked Mail | Workflow Progress | Au > [ ]

Accept Decline [ ]

Information  
No Attachments.

## Response Phase

The Response Phase is where the user has accepted the task and now enters/reviews the appropriate data and/or attachments to the record. When review is complete the user will send it to the appropriate step in the Workflow. Click Send (top right corner) and select the designated action from the drop-down menu and click **Send** if there is more than one action option (example the record could be sent for a revision or cancellation) then choose the desired action.

**Support Requests**

Support Requests

**Request Details**

Title: Testing Admin Workflow  
 Priority: High  
 Request Type: Business Process  
 Business Process: Unifier Change Request  
 Requested By: Cheryl DeGraff  
 Browser: Google Chrome - PC

**Request Description**

Please provide as much detail for the description as possible. Please be sure to attach any applicable screen shots, Ex: Error or Alert messages, forms, workflows or logs, etc.

Description: Testing the SR Admin workflow to see if UCR will auto-create

**Assignment Details**

Assigned To: Cheryl DeGraff  
 Assigned Date: 05/11/2023  
 Disposition: Resolved  
 UCR Needed?: Yes

**Request Resolution**

Workflow Action Details

Workflow Actions \*  
 Select

Send For

- Select
- No Confirmation Needed
- Send for Confirmation
- Request Approval
- Send for Clarification
- Update Request
- Send for Escalated Support
- Cancel

Cancel Send

Send Save [ ]

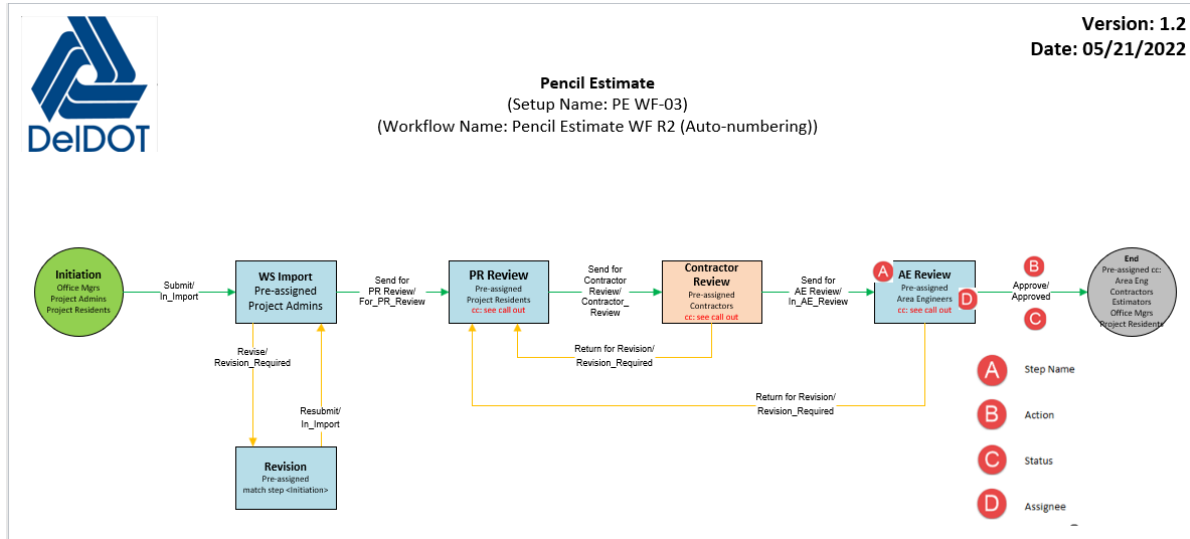
Information  
No Attachments.

## Introduction to Business Processes – BP(s)

### Overview of BPs

A Business Process (BP) is a formal transaction in Unifier™ that follows a pre-defined workflow. Some BPs do not have a workflow and they create Support records in Edit/Save mode. Each time a user fills out a

business process form and begins routing it or clicks on Finish Editing (only applicable to non-workflow BPs), a new record is created in Unifier™. The workflow defines the steps a record will take and what actions (including status) are given, as well as who can take action on these steps. Assignees are notified by email that someone has sent a record for their review or other action and it will appear on their Task Log.



### Main Form of a BP

The upper portion of the form contains basic (General) information such as the name of the record and its description, who created the record and when, and other general information relevant to BP. It may also contain fields for referencing other records (e.g. Contract Reference from the Contract - Summary BP). Fields with an Asterisk (\*) are required and must be filled out for the record to move onto the next step. Editable fields may be filled in but are not required (specific BP functions may apply).

Create New Pencil Estimate Send Save [Menu]

**Pencil Estimate**

**General**

Contract Reference \* ↖  
 [Icon]  
Required

Project Name

Estimate No.

Project Number

Period Start Date

Record No.

Period Cut Off Date \* ↖  
 [Calendar Icon]  
Required

Creation Date

Time Used This Period

Creator

**Pencil Estimate Dollar Amount**

Status

**Attachments** | Comments | Linked Records

[Attachment Icon]

**i**  
Information  
No Attachments.

## Workflow or Action Details

Prior to accepting a task/record, this section will display information about who the task is from, who it was sent to and what step in the workflow it was sent for.

The screenshot shows the 'Support Requests' interface. On the left, under 'Task Details', the following information is displayed:

- From:** Cheryl DeGraff
- To:** Cheryl DeGraff
- Sent For:** Complete Request

On the right, there are tabs for 'Attachments', 'Comments', 'Linked Records', and 'Lin'. A dropdown menu is visible with 'Accept' and 'Decline' options.

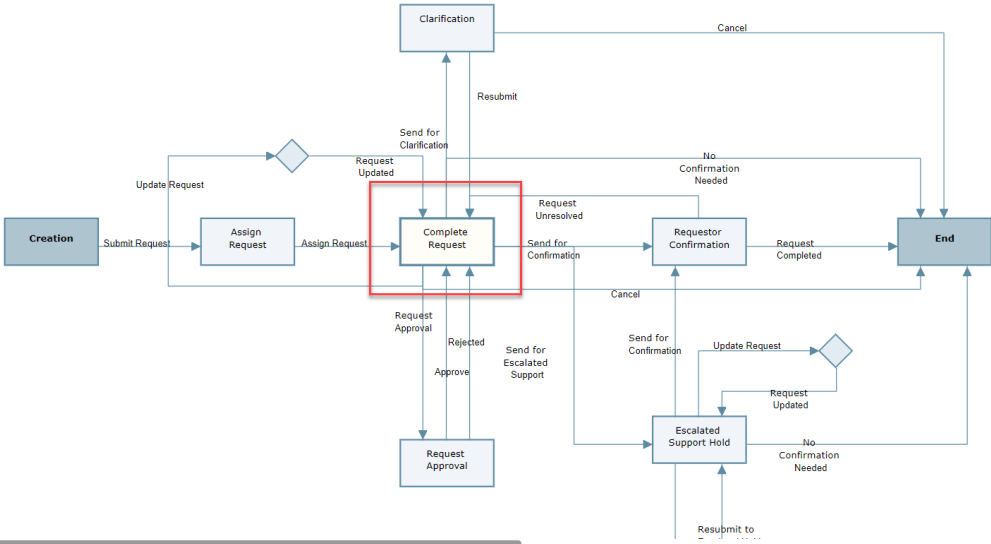
If you want to see what is happening within the record, click on **Workflow Progress** and it will bring up the data list of what steps have been taken in the workflow and who is taking those steps. If you select **View Graphic** a pop-out window will show you the workflow diagram and highlight what step the workflow is on.

The screenshot shows the 'Support Requests' interface with the 'Workflow Progress' tab selected. A red arrow points to the 'Workflow Progress' tab. Below the tabs, a table displays the workflow steps:

Step Name	Assignee	Company	Status	Action	Completion D
Creation	Cheryl DeGraff	Delaware Depart...	Completed	Submit Request	05/31/2023
Assign Request	Cheryl DeGraff	Delaware Depart...	Completed	Assign Request	05/31/2023
Complete Request	Cheryl DeGraff	Delaware Depart...	Not Started		

Below the table, there are input fields for 'Title' (Testing Admin Workflow) and 'Priority' (High). A 'Request Type' field is also visible.

Workflow Progress - Graphic



## Detail Form

The lower portion of the form contains the details of the record such as file attachments for Collaborative BPs (e.g. Submittals); line items for applicable Cost related BPs (e.g. Contracts and Change Orders)

Contracts - Summary Detail Forms

Contract **Bid Pay Items** Change Orders Progress Estimates

**General**  
 Project Number: T202106201  
 Record No.: CON-001  
 Project Name: Pavement & Rehabilitation, Kent I, (US 13-South DuPont Hwy- Harrington to  
 Creator: Billy Sweeney  
 Title: Pave & Rehab, Kent I, 2021  
 Creation Date: 06/29/2022 10:20 AM

Attachments Comments Linked Records Wo >

*Note: The first tab is always the main form*

Contracts - Summary

Contract **Bid Pay Items** Change Orders Progress Estimates

View Currency Transaction Current

No.	Pay Item	Section	Pay Item Name	Qty
001	202000	0001	EXCAVATION AND EMBANKMENT	1,568
002	202004	0001	UNDERCUT EXCAVATION, PATCHING	76
003	207021	0001	STRUCTURAL BACKFILL, (BORROW TYPE...	12
004	209006	0001	BORROW, TYPE F	277
005	211001	0001	REMOVAL OF PORTLAND CEMENT CON...	559
006	301001	0001	GABC	105
007	301002	0001	GABC, PATCHING	85
008	301003	0001	GABC	172
009	401016	0001	SUPERPAVE TYPE B, PG 76-22	5,930
010	401031	0001	SUPERPAVE TYPE BCBC, PG 64-22, PATC...	185
011	401046	0001	SUPERPAVE TYPE C, PG 76-22 (NON-CA...	70,725
012	401504	0001	HIGH PERFORMANCE BITUMINOUS CON...	3,200
013	401690	0001	ENTRANCE, DRIVEWAY, AND INTERSECTI...	1,457
014	402000	0001	BITUMINOUS CONCRETE PATCHING	2,800

Line Item Details Attachments Linked Records

Line Item Cost BreakDown

**General**  
 Pay Item ML Ref: [ ] Cost Line Item Type: [ ]  
 Unit Cost: [ ]  
 Pay Item: 202000 Item Quantity: [ ]  
 Pay Item Name: EXCAVATION AND EMBANKMENT Unit of Measure: CY  
 Spec Year: 2020 Item Unit Cost: [ ]  
 Section: 0001 Pay Item Desc: [ ]

*Note: Preview panel for each line item clicked on*

## Adding a Line Item

There are multiple ways to add line items to a record. Manually, Consolidate Line Items or via Import.

Contracts - Summary

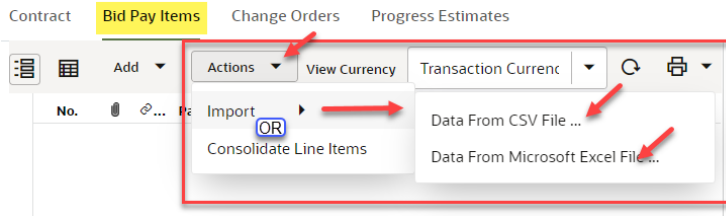
Contract **Bid Pay Items** Change Orders Progress Estimates

Add Actions View Currency Transaction Current

Lump Sum  
 Unit Cost  
 Variable Unit Cost

Choose the LI Type

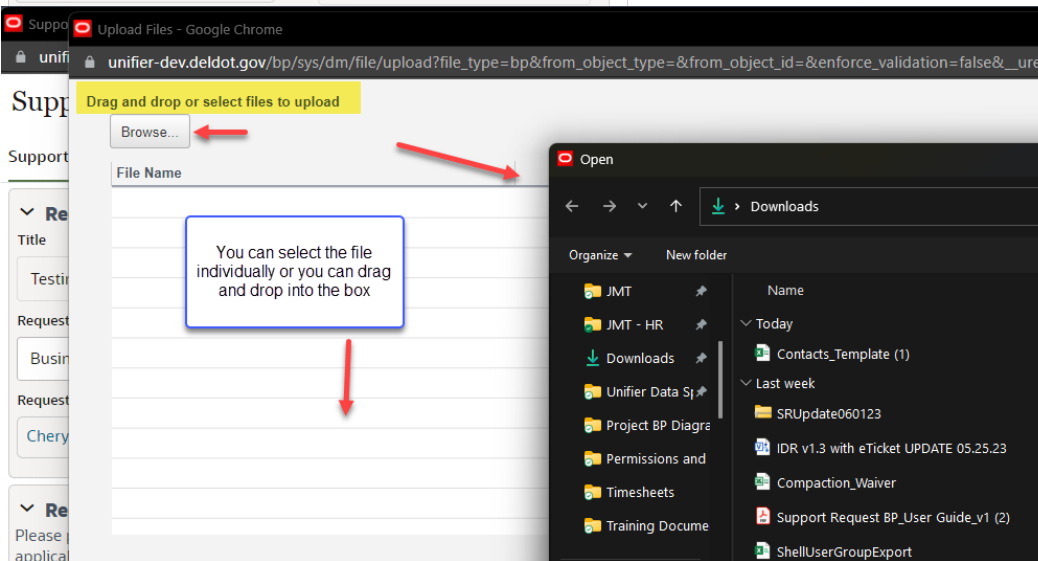
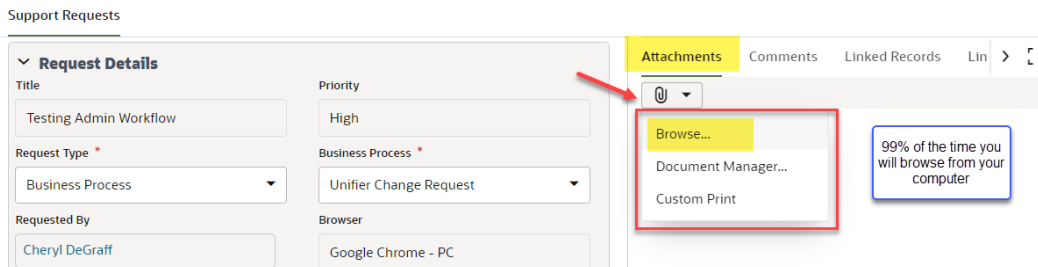
## Contracts - Summary



### Attach a file

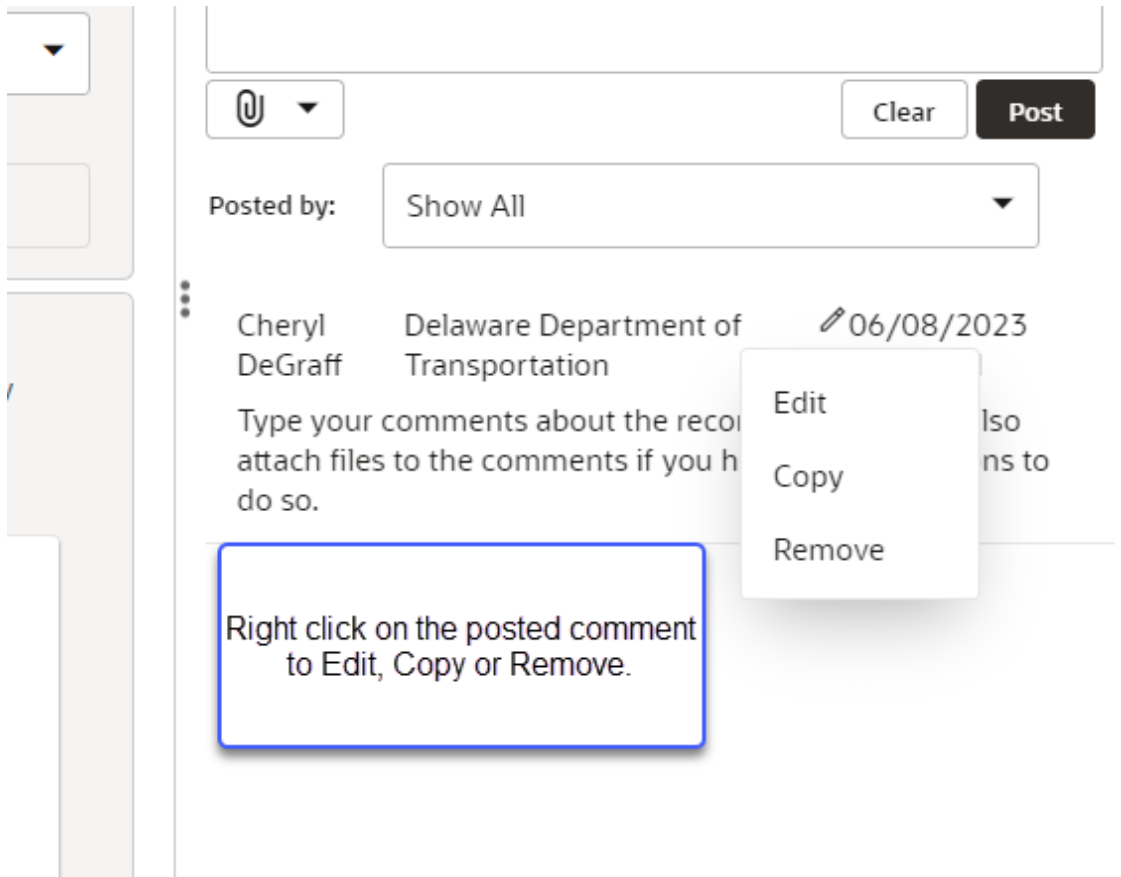
From the side menu bar, click Attachments. Select Browse to retrieve a file(s) from your computer.

## Support Requests

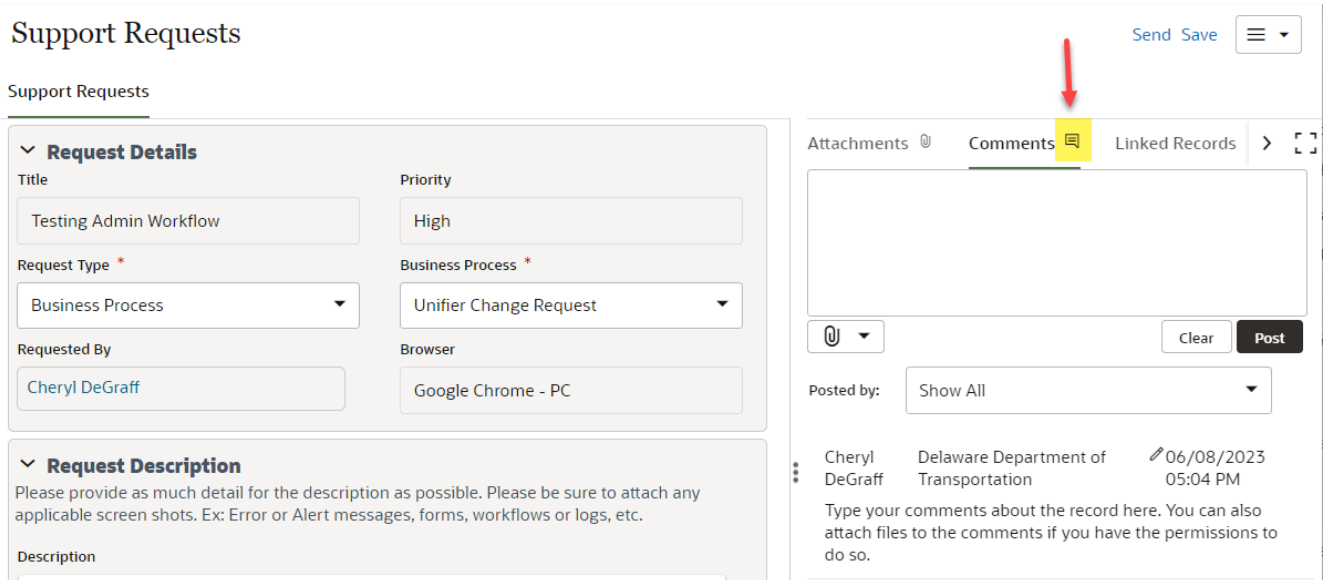






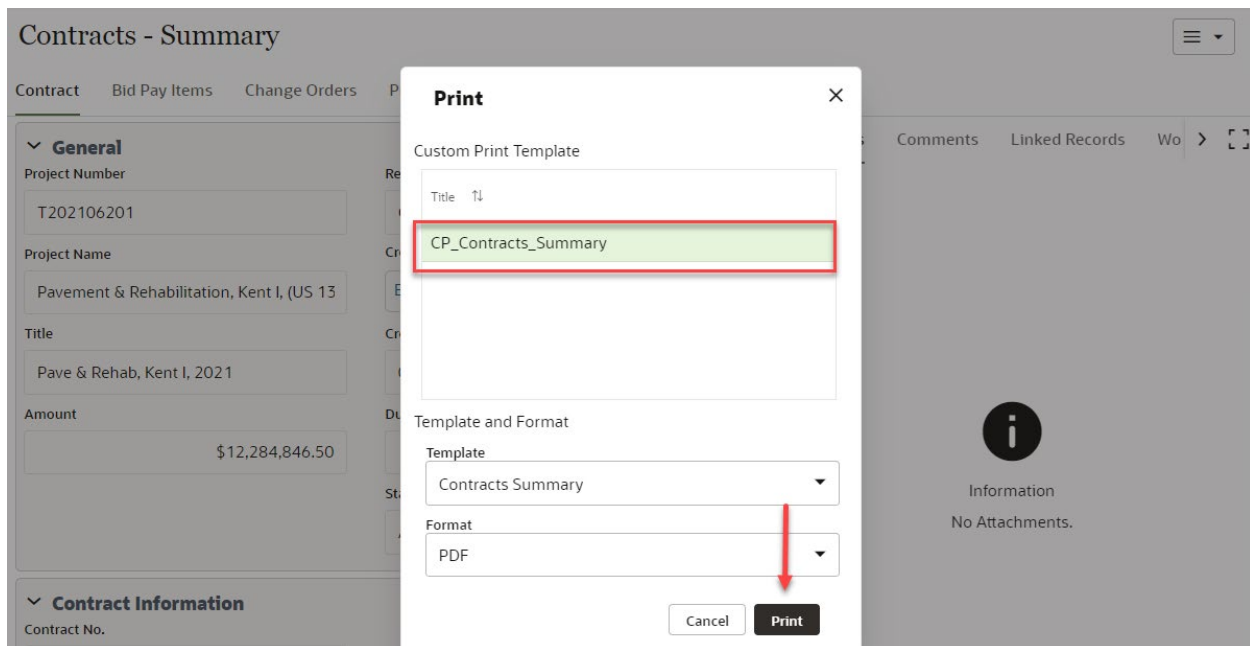
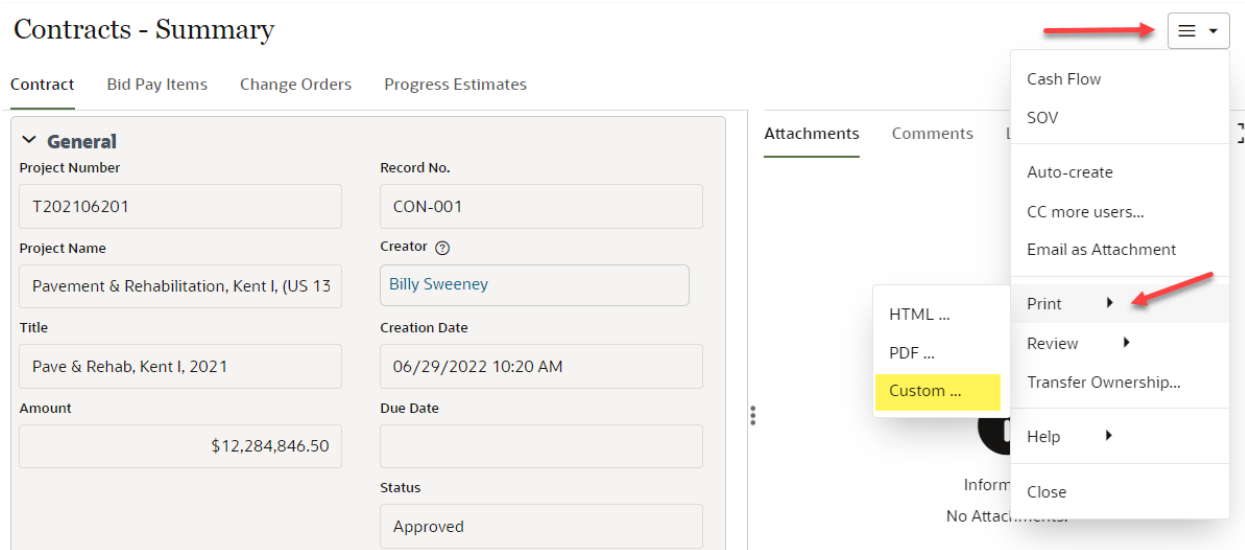


If General Comments are in the record, it will show the “message” icon letting you know there are comments in the record.



## BP Record Custom Prints

Several BPs have been programmed with custom prints as required by DelDOT. A custom print is created with BI publisher by the Unifier administration team. It allows for customized formatting of how the record appears in print. Follow the steps as shown below. If there is no custom print associated with the BP, there will be nothing in the Custom Print Template box below and you will use the PDF or HTML standard record print.





DELAWARE DEPARTMENT OF TRANSPORTATION

Contract No. : T202106201

Contract Pay Items Summary

To: Diamond Materials LLC

Project: Pavement & Rehabilitation, Kent I, (US 13-South DuPont Hwy- Harrington to Woodside),2021

Effective Date: 05/13/2022  
 First Chargeable Date: 05/16/2022  
 Orig. Completion Date: 03/31/2023

Specification Year = 2020

Custom Print Example

Pay Items	Pay Item Name	Quantity	Unit Price	Amount
202000	EXCAVATION AND EMBANKMENT	1,568.00 CY	\$ 18.00	\$ 28,224.00
202004	UNDERCUT EXCAVATION, PATCHING	76.00 CY	\$ 27.00	\$ 2,052.00
207021	STRUCTURAL BACKFILL, (BORROW TYPE C)	12.00 CY	\$ 30.00	\$ 360.00
209006	BORROW, TYPE F	277.00 CY	\$ 35.00	\$ 9,695.00
211001	REMOVAL OF PORTLAND CEMENT CONCRETE PAVEMENT, CURB AND SIDEWALK	559.00 SY	\$ 50.00	\$ 27,950.00
301001	GABC	105.00 CY	\$ 90.00	\$ 9,450.00
301002	GABC, PATCHING	85.00 CY	\$ 105.00	\$ 8,925.00
301003	GABC	172.00 TON	\$ 65.00	\$ 11,180.00
401016	SUPERPAVE TYPE B, PG 76-22	5,930.00 TON	\$ 100.00	\$ 593,000.00
401031	SUPERPAVE TYPE BCBC, PG 64-22, PATCHING	185.00 TON	\$ 135.00	\$ 24,975.00
401046	SUPERPAVE TYPE C, PG 76-22 (NON-CARBONATE STONE)	70,725.00 TON	\$ 90.00	\$ 6,365,250.00
401504	HIGH PERFORMANCE BITUMINOUS CONCRETE WEARING SURFACE	3,200.00 TON	\$ 155.00	\$ 496,000.00
401690	ENTRANCE, DRIVEWAY, AND INTERSECTING STREET PAVING AND MILLING SURCHARGE	1,457.00 TON	\$ 15.00	\$ 21,855.00
402000	BITUMINOUS CONCRETE PATCHING	2,800.00 SYIN	\$ 4.00	\$ 11,200.00
403000	BITUMINOUS CONCRETE AND/OR COLD-LAID BITUMINOUS (TRM) CONCRETE	610.00 TON	\$ 55.00	\$ 33,550.00
503001	PATCHING PCC PAVEMENT, 6' TO 15', TYPE A	2,984.00 SY	\$ 218.00	\$ 650,512.00
503006	DOWEL BARS	5,968.00 EACH	\$ 19.50	\$ 116,376.00
503503	PATCHING CONCRETE	22,751.00	\$ 5.65	\$ 128,543.15

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Printed on June 9, 2023

## Reports

The Reports folder consists of User-Defined Reports (standard) and DeIDOT Reports (custom) that provide project-specific data by BP. Reports will only be visible to Users who have been granted permissions.

The screenshot shows the Oracle Primavera Unifier interface. The left sidebar contains a navigation menu with 'Reports' highlighted. Under 'Reports', there is a sub-menu 'DeIDOT Reports' which is expanded to show a list of reports: '01 - Project Contacts', '02 - RFI Log', '05a - Estimate Worksheet', '04a - Summary Qty Overrun Und...', '05 - IDR PayItems', '06 - IDRs', '07 - Item Reconciliation', '09 - Submittals Log', and '10 - Advanced Material Payments'. The main content area displays the '01 - Project Contacts' report configuration, including 'Template and Format' (Project\_Contacts), 'Search Parameters', and 'Additional Parameters'. A 'Run Report' button is visible at the bottom right. A text box with arrows pointing to the report list and the 'Run Report' button contains the text: 'There are a series of custom reports pre-built for the projects. All you need to do is single click on a report from the list and click run report.'



Project No: T202004601  
 Project Name: Park Avenue Relocation, Phase 1

ID	Title	Submittals Type	Date Received	Sent for Review	Date Returned	Reviewer Decision	Status
SUB FORM 5	Subcontractor - Victory Garden		5/25/2022				In_AE_Review
SUB FORM 6	Subcontractor - Zone		5/25/2022				In_AE_Review
SUB FORM 9	Subcontractor - Tallet Brothers		7/18/2022				In_AE_Review
SUB FORM 10	Subcontractor - Tegeler		7/18/2022				Revision_Required
SUB FORM 9	Subcontractor - Tallet Bros.		7/18/2022				Revision_Required
SUB FORM 10	Subcontractor - Tegeler		7/13/2022				In_AE_Review
SUB FORM 10	Subcontractor - Tegeler Supply		7/13/2022				Revision_Required
SUB FORM 9	Subcontractor - Talley Bros.		7/13/2022				Revision_Required
SUB FORM 7	Subcontractor - Mattioli		5/25/2022				In_AE_Review
SUB FORM 1	Subcontractor - BW Electric		5/25/2022				In_AE_Review
SUB FORM 2	Subcontractor - Direct & Correct		5/25/2022				In_AE_Review
SUB FORM 4	Subcontractor - SMI		5/25/2022				In_AE_Review

Example of DelDot Custom Report for Submittals

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June 9, 2023

### User-Defined Reports

User-Defined Reports provide project-specific data by BP and are normally requested as needed. Reports will only be visible to Users who have been granted permissions.

Reports can be generated in the following formats:

- HTML - The fastest option, opens the report in the browser window, but is not designed for printing.
- CSV (Comma Separated Values for Excel)
- Excel (includes formatting)
- PDF formats - Most reports will look their best in this format, often used for saving and sending via email.

In the example below the report details a weekly summary of Inspector Daily Reports.

IDR Weekly Summary							
Project Number: T202004601							
Project Name: Park Avenue Relocation, Phase 1							
Query Parameters:							
Results matching ALL following condition(s):							
Data Element: Condition Value							
Inspector Daily Reports Line Item / Remarks: is not empty 1							
Contractor	Crew / Foreman Name	Inspector	Remarks	Active / Inactive	Calendar Days	Remaining Days	Comments
<b>2022-05-22 00:00:00.0</b>							
Allan Myers MD Inc	Bill Beaduet	David Webster	Direct and Correct: Unskilled: 1 Intermittent Driver: 1 Flaggers: 1 (Didn't Flag) Pickup: 1 Other Truck: TMA (Not Paid) Zone: Intermittent Driver: 2 Skilled: 1 Trucks: 1 Paint Truck, 1 Paint Remover truck	Active	0	0	
<b>2022-05-23 00:00:00.0</b>							
Allan Myers MD Inc	Rob	David Webster	SMI: Foreman: Easy Unskilled: 2 Pickup: 1 Skid Steerer: 1	Active	0	0	
<b>2022-05-24 00:00:00.0</b>							
Allan Myers MD Inc	N/A	David Webster	SMI: Foreman: Easy Unskilled: 2 Pickup: 1 Equipment: Skid Steer	Active	0	0	
<b>2022-05-25 00:00:00.0</b>							
Allan Myers MD Inc	Easy	David Webster	SMI: Foreman: Easy Unskilled: 2 Equipment: 1 Skid Steerer Pickup: 1	Active	0	0	
<b>2022-05-27 00:00:00.0</b>							
Allan Myers MD Inc	Rob	David Webster	SMI: Foreman: Easy Unskilled: 2 Pickup: 1 Equipment: Skid Steerer	Active	0	0	
<b>2022-05-31 00:00:00.0</b>							
Allan Myers MD Inc	Steve	Dan McGettigan	Other Truck - TMA (2) Contractor - Direct & Correct	Active	0	0	