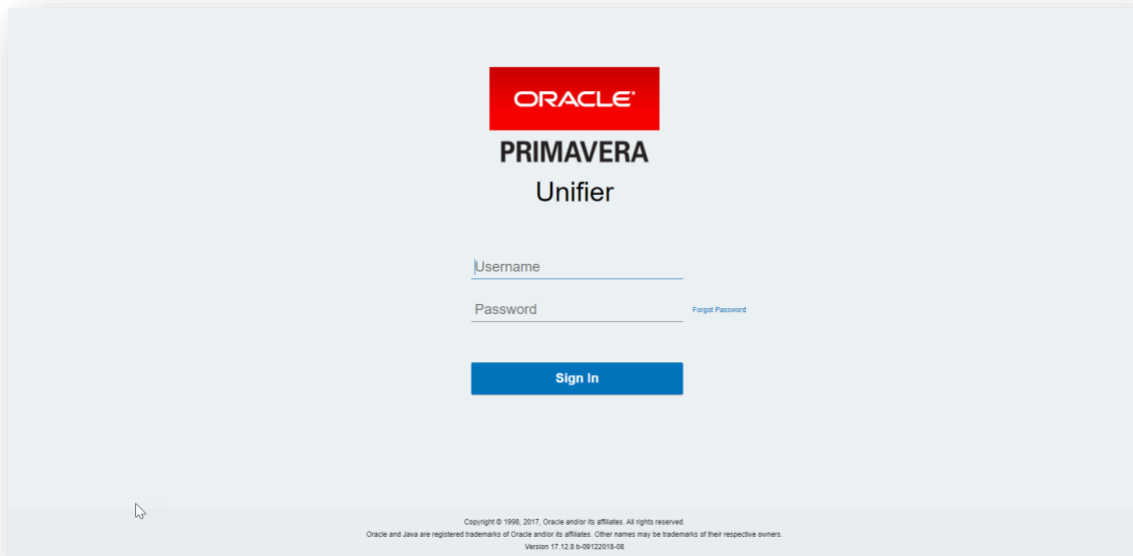


NOTE: All updates to Unifier have been visual/layout upgrades to improve user navigation. The core of how business processes flow and how we conduct business in the system is remaining the same.

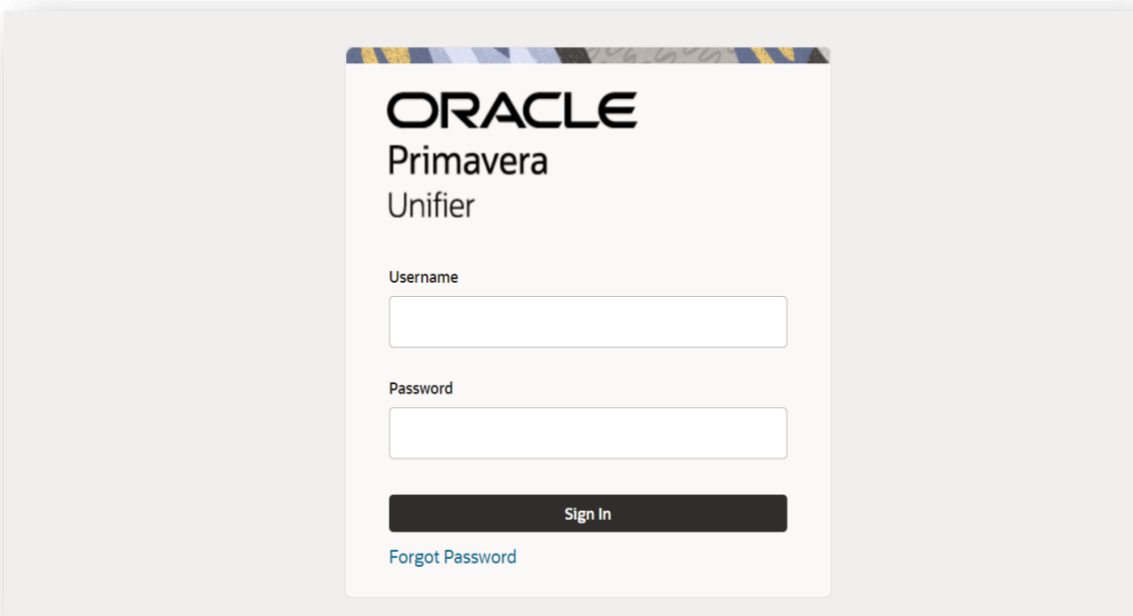
1. The login screen has slightly changed

PRIOR:



The prior login screen for Oracle Primavera Unifier features a light blue background. At the top center is the Oracle logo (a red rectangle with "ORACLE" in white) followed by "PRIMAVERA" in bold black text and "Unifier" in a regular black font. Below the text are two input fields: "Username" and "Password". The "Password" field has a "Forgot Password" link to its right. A blue "Sign In" button is positioned below the input fields. At the bottom, there is a small copyright notice: "Copyright © 1996, 2017, Oracle and/or its affiliates. All rights reserved. Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners. Version 17.12.8 b-09122016-08".

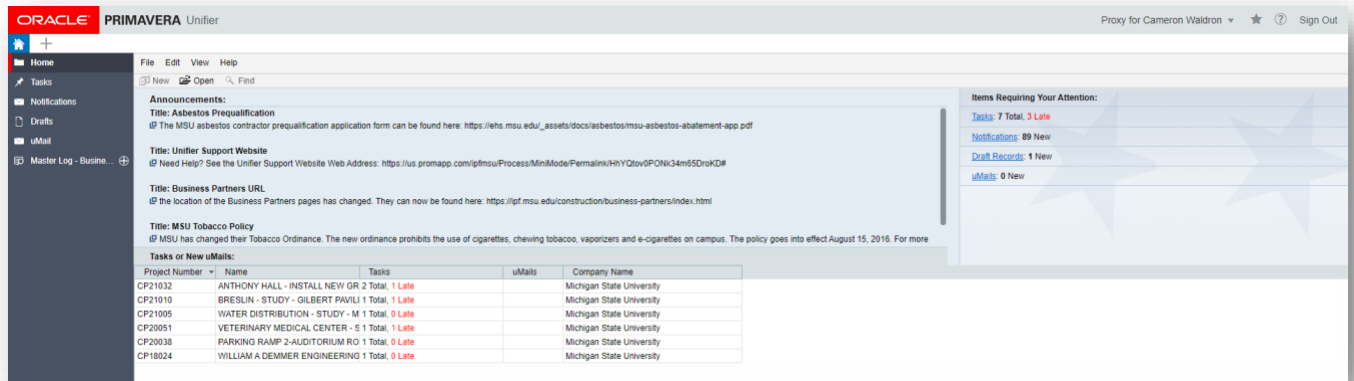
NEW:



The new login screen for Oracle Primavera Unifier features a light gray background. The login form is a white card with a decorative header bar at the top. The header bar has a pattern of blue, yellow, and black stripes on the left and a solid blue section on the right. The Oracle logo is in black, followed by "Primavera" and "Unifier" in a sans-serif font. Below the text are two input fields: "Username" and "Password". A dark gray "Sign In" button is positioned below the input fields. A "Forgot Password" link is located at the bottom left of the card.

## 2. Home Tab

PRIOR:



**ORACLE PRIMAVERA Unifier** Proxy for Cameron Waldron Sign Out

File Edit View Help

New Open Find

**Announcements:**

**Title: Asbestos Prequalification**  
The MSU asbestos contractor prequalification application form can be found here: <https://ehs.msu.edu/assets/docs/asbestos/msu-asbestos-abatement-app.pdf>

**Title: Unifier Support Website**  
Need Help? See the Unifier Support Website Web Address: <https://us.promapp.com/plmsuProcess/MiniMode/Permalink/94YQ2v9POn/34m55DnKDI>

**Title: Business Partners URL**  
The location of the Business Partners pages has changed. They can now be found here: <https://lplf.msu.edu/construction/business-partners/index.html>

**Title: MSU Tobacco Policy**  
MSU has changed their Tobacco Ordinance. The new ordinance prohibits the use of cigarettes, chewing tobacco, vaporizers and e-cigarettes on campus. The policy goes into effect August 15, 2016. For more

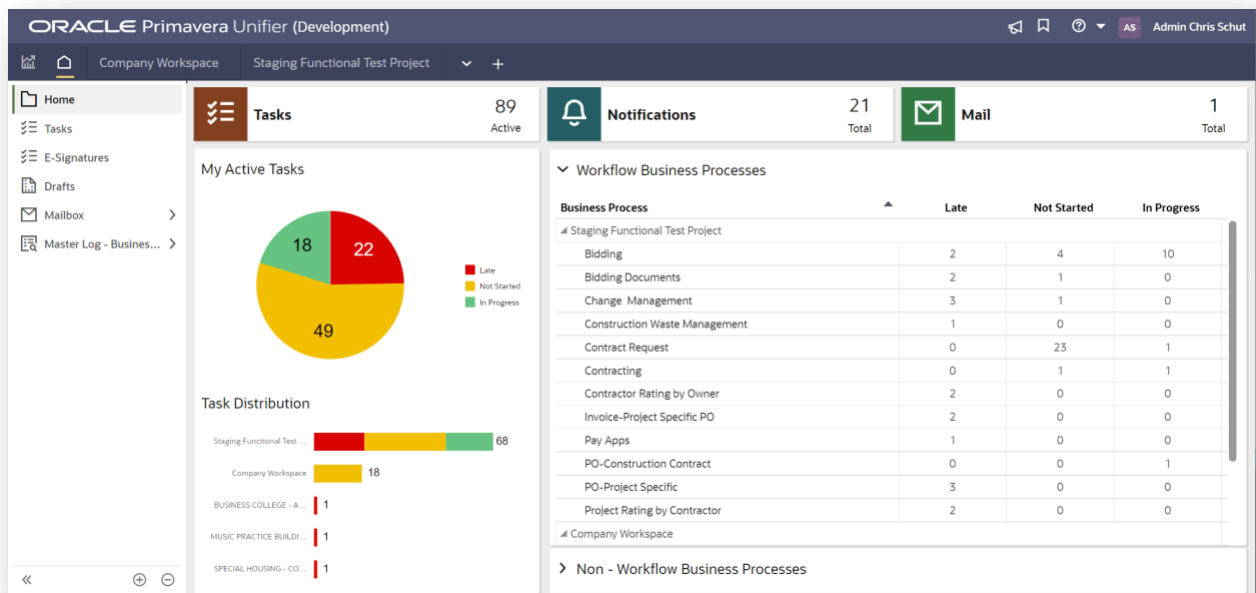
**Tasks or New uMails:**

Project Number	Name	Tasks	uMails	Company Name
CP21032	ANTHONY HALL - INSTALL NEW OR 2 Total, 1 Late	1 Late		Michigan State University
CP21010	BRESLIN - STUDY - GILBERT PAVIL 1 Total, 1 Late	1 Late		Michigan State University
CP21005	WATER DISTRIBUTION - STUDY - M 1 Total, 0 Late	0 Late		Michigan State University
CP20051	VETERINARY MEDICAL CENTER - S 1 Total, 1 Late	1 Late		Michigan State University
CP20038	PARKING RAMP 2-AUDITORIUM RD 1 Total, 0 Late	0 Late		Michigan State University
CP18024	WILLIAM A DEMMER ENGINEERING 1 Total, 0 Late	0 Late		Michigan State University

**Items Requiring Your Attention:**

**Tasks:** 7 Total, 3 Late  
**Notifications:** 89 New  
**Draft Records:** 1 New  
**uMails:** 0 New

NEW: Dashboard layout with metric driven widgets



**ORACLE Primavera Unifier (Development)** Admin Chris Schut

Company Workspace Staging Functional Test Project

**Tasks** 89 Active

**Notifications** 21 Total

**Mail** 1 Total

**My Active Tasks**

Pie Chart Legend: Late (Red), Not Started (Yellow), In Progress (Green)

Task Distribution: 18 Late, 22 Not Started, 49 In Progress

**Task Distribution**

Task	Late	Not Started	In Progress
Staging Functional Test ...	1	1	66
Company Workspace	0	18	0
BUSINESS COLLEGE - A...	1	0	0
MUSIC PRACTICE BUILD...	1	0	0
SPECIAL HOUSING - CO...	1	0	0

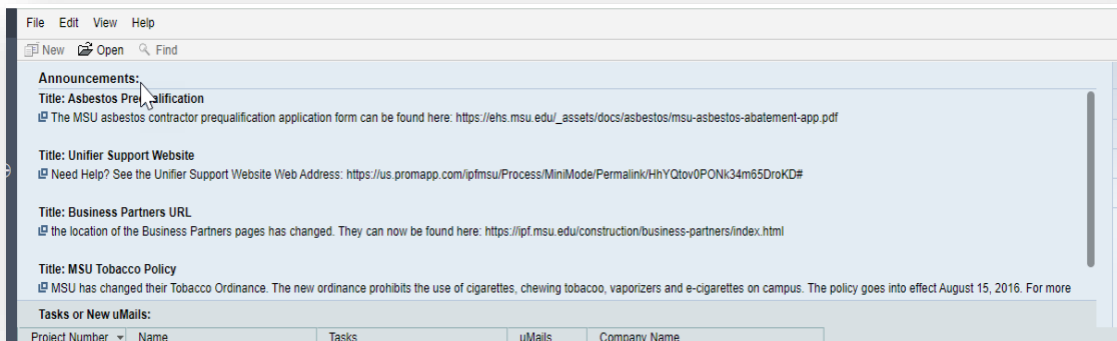
**Workflow Business Processes**

Business Process	Late	Not Started	In Progress
Staging Functional Test Project			
Bidding	2	4	10
Bidding Documents	2	1	0
Change Management	3	1	0
Construction Waste Management	1	0	0
Contract Request	0	23	1
Contracting	0	1	1
Contractor Rating by Owner	2	0	0
Invoice-Project Specific PO	2	0	0
Pay Apps	1	0	0
PO-Construction Contract	0	0	1
PO-Project Specific	3	0	0
Project Rating by Contractor	2	0	0
Company Workspace			

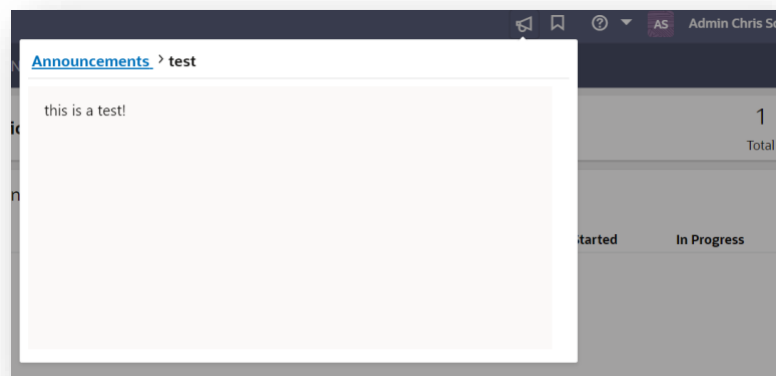
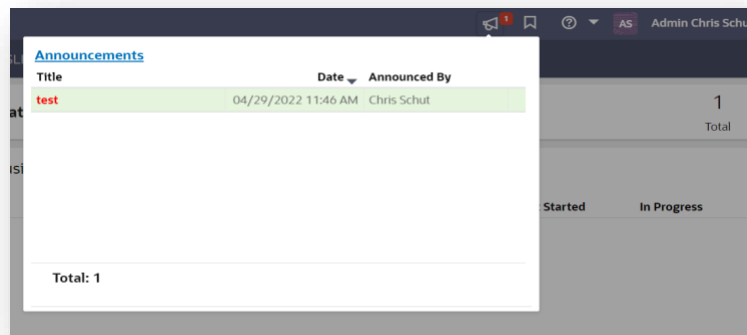
**Non - Workflow Business Processes**

### 3. New Location for Announcements

PRIOR: Located on home tab front and center

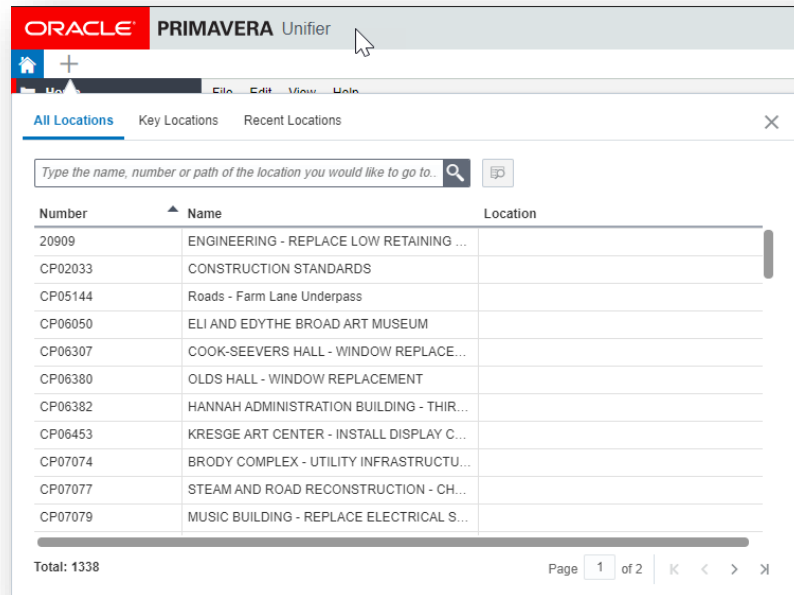


NEW: Located in upper right corner under the megaphone. It will turn red with a number if there are new announcements. When opened initially, they show up in a list. Double click on one to open full details.

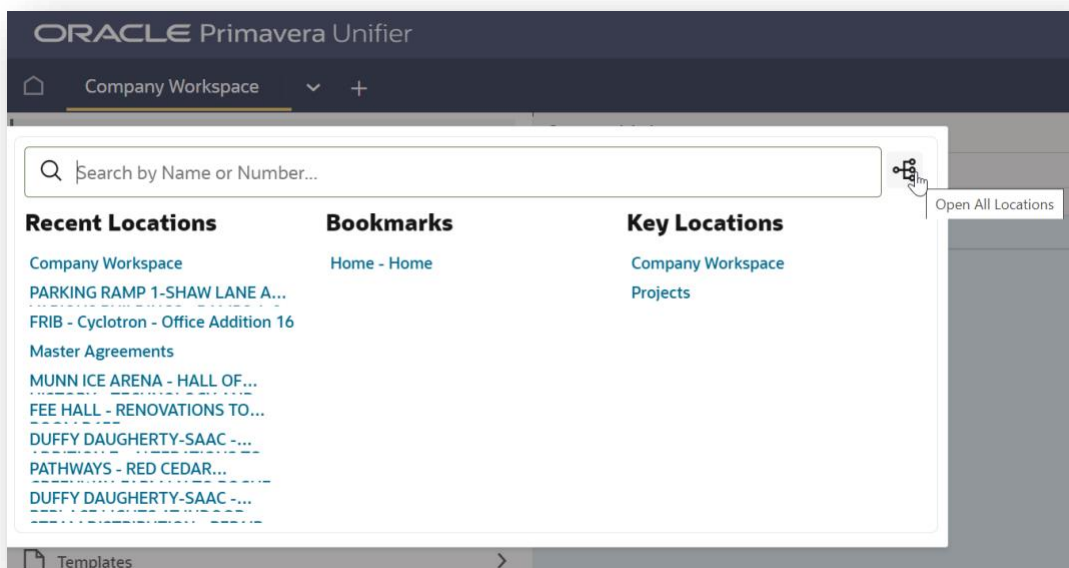


4. Hitting '+' to create new project tab has slight visual changes

PRIOR:



NEW: Brings up a screen that looks slightly different but functions the same way as before. If you prefer the old list style rather than typing in the project name or number, select the branching icon located on the right side of the search box.















## 5. Task Log Updates

### 5.1. Task Status in Task Log

PRIOR: We didn't have the check box; tasks were either red (overdue) or black (normal) text.

Tasks - Current View: All







5 Item(s) Page 1















		Source Name	Type	Number	Title
		BRESLIN - STUDY - GILBERT PAVILION - HALL OF HISTORY DISPLAY	Change Management	CM-0002	AE Chg Request-CP21
		ANTHONY HALL - INSTALL NEW GREASE TRAP AT MEAT LAB	PO-Construction Contract	CON-0002	CP21032-Peter Basso
		PARKING RAMP 2-AUDITORIUM ROAD - ANNUAL MAINTENANCE	PO-Construction Contract	CON-0002	
		ANTHONY HALL - INSTALL NEW GREASE TRAP AT MEAT LAB	PO-Construction Contract	CON-0001	CP21032-Nielsen Com
		Master Agreements	eBidding	RFB-0006	CP99RFP-

NEW: Task Status column added as first column on task list. You can accept or undo accept task by clicking on the checkmark on the left of the record from the task list screen.

Red = overdue, blue = normal, white fill = not accepted, color fill = accepted

## Tasks

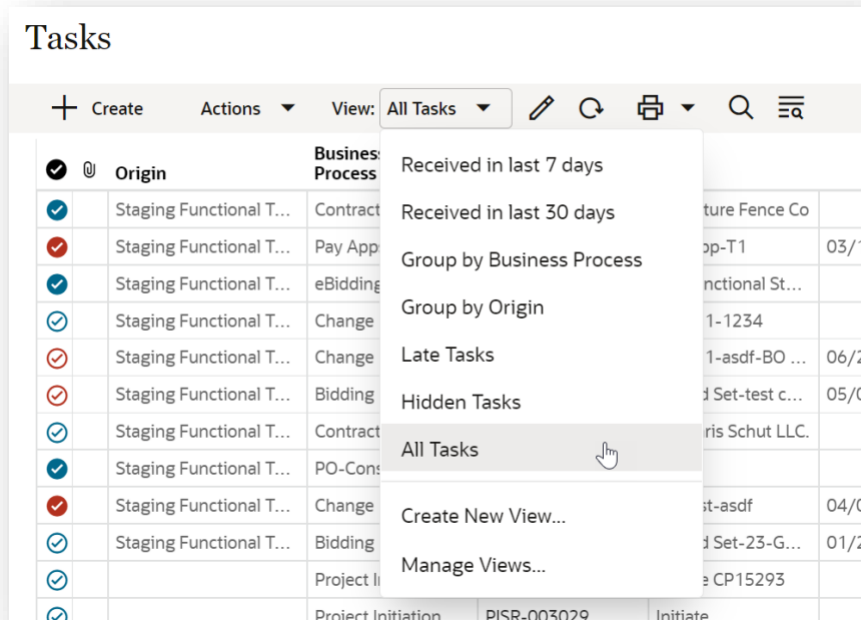
 Create    Actions ▼    View: All Tasks ▼       ▼     

		Origin	Business Process	Record Number	Title	Record Due	Fr
		Staging Functional T...	Contract Request	CR-0064	T1-Future Fence Co		Ac
		Staging Functional T...	Pay Apps	PAY-0012	Pay App-T1	03/17/2016 09:...	Ac
		Staging Functional T...	eBidding	RFB-0088	T1-Functional St...		Ac
		Staging Functional T...	Change Manage...	CM-0050	T1-321-1234		tra
		Staging Functional T...	Change Manage...	CM-0022	T1-321-asdf-BO ...	06/28/2018 02:...	Ac
		Staging Functional T...	Bidding Documents	BD-0010	T1-Bid Set-test c...	05/02/2018 08:...	Ac
		Staging Functional T...	Contract Request	CR-0038	T1-Chris Schut LLC.		Ac
		Staging Functional T...	PO-Construction ...	CON-0010			Ac
		Staging Functional T...	Change Manage...	CM-0020	T1-test-asdf	04/06/2018 12:...	Ac
		Staging Functional T...	Bidding Documents	BD-0009	T1-Bid Set-23-G...	01/25/2018 07:...	Ac
			Project Initiation	PISR-003030	Initiate CP15293		M
			Project Initiation	PISR-003029	Initiate		M

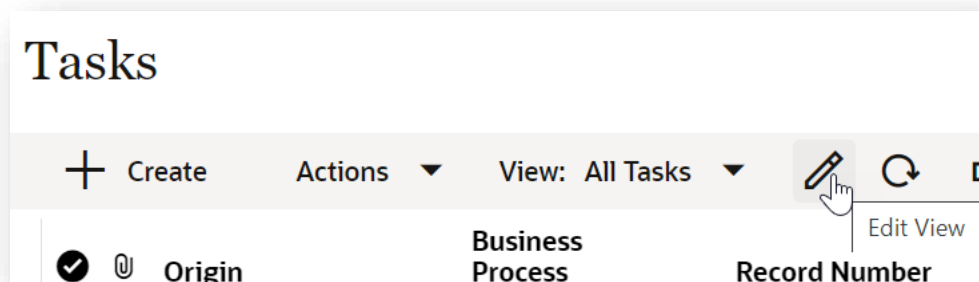
## 5.2. Views in Task Log

**PRIOR:** In 'Classic View' you didn't have the option to modify your view.

**NEW:** Click on the View dropdown to see available views, create new, and manage existing. Default is set to all tasks, but Unifier will remember what view you are using for a specific BP or section across sessions and projects.



**Modifying Views:** Click on pencil icon to modify existing view. If a view has been modified but not saved it will show as (modified) viewName.



Edit View

View Name

All Tasks

Cancel

Apply

Save As

Columns

Filters

Group By

Sort By

Available Columns

Project Number

>

>>

<

<<

Selected Columns ?

Origin

Business Process

Record Number

Title

Record Due

From

Sent for

Task Due

Received

<<

<

>

>>

Lock after selected Column

None

Number of Records per Page

1000

- Columns – can change which columns are visible and in what order they appear
- Filters – lots of options, restricts which data gets through to the log
- Group by – puts a top level on the log (group by vendor name for example) – click on gear icon to left to add additional
- Sort by – changes order in which records appear – use gear for additional layers (ex. Received descending, due ascending)

## 6. Preview Pane

NEW: Clicking once on a record in your task list will bring up a task preview alongside your task list. This preview will show you three different tabs: Record Details, Workflow Progress, and Attachments. To return to your full task list without the preview, click on 'Tasks' in the upper left corner home menu.

### 6.1 Record Details – shows the form and data

Blocks are collapsible by clicking on triangle arrow next to each block header

### 6.2 Workflow Progress – see 7.7

### 6.3 Attachments – see 7.3

The screenshot displays the 'Staging Functional Test Project' interface. On the left, a 'Tasks' panel shows a list of tasks with columns for Origin, Business Process, Record Number, Title, and Record Due. The first task, 'Staging Functional ...', is selected. On the right, a preview pane for this task is shown with three tabs: 'Record Details', 'Workflow Progress', and 'Attachments'. The 'Record Details' tab is active, displaying 'User Instructions', 'Need Help?' with a link, 'Project Information' with fields for Project Name and Project Number, and 'General' information including Record Number and Creator.

Origin	Business Process	Record Number	Title	Record Due
Staging Functional ...	Contract Request	CR-0064	T1-Future Fence...	
Staging Functional T...	Pay Apps	PAY-0012	Pay App-T1	03/17/2016 09
Staging Functional T...	eBidding	RFB-0088	T1-Functional St...	
Staging Functional T...	Change Manage...	CM-0050	T1-321-1234	
Staging Functional T...	Change Manage...	CM-0022	T1-321-asdf-BO ...	06/28/2018 02
Staging Functional T...	Bidding Documents	BD-0010	T1-Bid Set-test c...	05/02/2018 08
Staging Functional T...	Contract Request	CR-0038	T1-Chris Schut LLC.	
Staging Functional T...	PO-Construction ...	CON-0010		
Staging Functional T...	Change Manage...	CM-0020	T1-test-asdf	04/06/2018 12
Staging Functional T...	Bidding Documents	BD-0009	T1-Bid Set-23-G...	01/25/2018 07
Staging Functional T...	eBidding	RFB-0082	T1-Functional St...	
Staging Functional T...	Contract Request	CR-0037	T1-	
Staging Functional T...	Contract Request	CR-0036	T1-Danielle Turn...	
Staging Functional T...	eBidding	RFB-0077	T1-Functional St...	
Staging Functional T...	eBidding	RFB-0076	T1-Functional St...	
Staging Functional T...	eBidding	RFB-0074	T1-Functional St...	
Staging Functional T...	eBidding	RFB-0072	T1-Functional St...	
Staging Functional T...	eBidding	RFB-0069	T1-RFB	
Staging Functional T...	Bidding	RFB-0068	T1-RFB	

**Record Details** | Workflow Progress | Attachments

**User Instructions**  
The Contract Request provides a starting point for EAS Reps or Designers to define a scope of work and request the creation of a PO commitment for their project. Review the proposal and select one of the following options for the type of Purchase Order to be issued for the vendor. To ensure a speedy process, verify that supporting documentation from the vendor that specifies details about the work and costs have been attached.

**Need Help?**  
<https://us.promapp.com/ipfmsu/Process/MiniMode/Permalink/HhYQtovOP...>

To view a list of documents that are required to be attached to the Contract Request, go to:  
**Contract Request Attachment List**  
<https://unify.gis.msu.edu/cms/?q=contractrequestdocs>

**Project Information**  
Project Name  
Staging Functional Test Project  
Project Number  
T1

**General**  
Record Number  
CR-0064  
Creator  
Admin Chris Schut



## 7. Working on a task in a pop-up window/form

### 7.1. New Form Layout

PRIOR: Had three stacked panes or folder tabs: 'TASK AF', 'Action Details', and 'Line Items'

The screenshot shows a web browser window with the title "PO-Construction Contract - CP20051-Granger Construction Co - Project No. CP20051". The browser address bar shows a URL from "unifler.msu.edu". The page has a menu bar with "File", "Edit", "View", "Actions", and "Help". Below the menu bar is a "Workflow Actions" section with buttons for "Send", "Save", "Spelling...", "Add Attachment...", "Discussion", "Cash Flow", "Review", and "Close Window". The main content area is divided into three stacked panes: "PO Update Auditor AF", "Action Details", and "Line Items". The "PO Update Auditor AF" pane contains "User Instructions" and "Project Information". The "Action Details" pane contains a "Send For:" section with "To:" and "Cc:" fields, and a "Send For:" button. The "Line Items" pane contains a table with 6 items, showing columns for "No.", "WBS Code", "WBS Description", "Short Description", and "Amount". The table data is as follows:

No.	WBS Code	WBS Description	Short Description	Amount
008	105-Construction-Summary+	Construction Contract Summ CM Paint & Repairs Allowan		\$1,000.00
005	105-Construction-Summary+	Construction Contract Summ CM Bond & Insurance		\$2,264.00
004	105-Construction-Summary+	Construction Contract Summ CM Fee		\$5,806.00

At the bottom of the "Line Items" pane, there are buttons for "Add", "Copy", "Import", "Remove", "Grid", and "Find". There is also a "Show Filtered Total Amount" checkbox and a "Total Amount" field showing "\$125,196.00".

NEW: Two pane view with tabs across the top - form on left and details on the right. Details has different sections depending on the task / business process type but for general purposes, layout is the same.

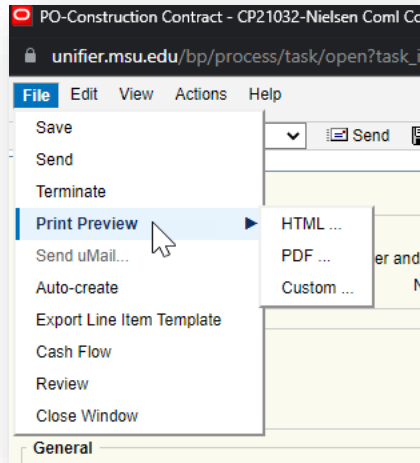
The screenshot shows a web browser window with the title "PO-Construction Contract - Project No. T1 - Google Chrome". The browser address bar shows a URL from "unifler-staging.test.it-services.msu.edu". The page has a menu bar with "Send", "Save", and a hamburger menu icon. The main content area is divided into two panes: "Construction PO Vendor AF" and "Line Items". The "Construction PO Vendor AF" pane contains "User Instructions", "Project Information", and "General" sections. The "User Instructions" section contains text about creating the SOV and a "Need Help?" link. The "Project Information" section contains fields for "Project Name" (Staging Functional Test Project) and "Project Number" (T1). The "General" section contains fields for "Record Number" (CON-0010), "Creator" (Admin Chris Schut), "Title" (MSU), "Status" (Pending), and "Creation Date" (02/16/2018 10:13 AM). The "Line Items" pane contains a table with 2 items, showing columns for "Name", "Title", "Pub. No.", "Rev. No.", "Issue Date", "Size", and "Loc". The table data is as follows:

Name	Title	Pub. No.	Rev. No.	Issue Date	Size	Loc
ajp1.jpg					1970 KB	
ajp2.jpg					3081 KB	

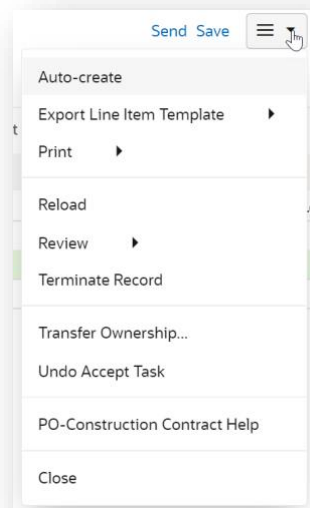
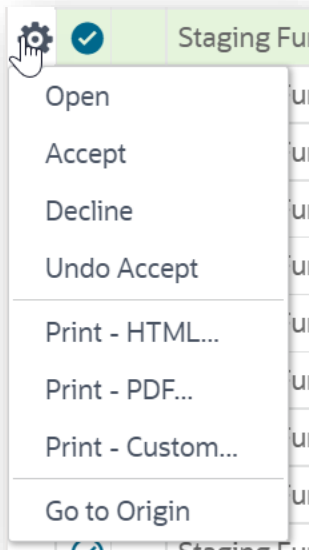
At the bottom of the "Line Items" pane, there is a "Total: 2" label.

## 7.2. Toolbar options (File, Edit, View, Actions, Help) have relocated

PRIOR: Located only in the pop-up task window/form under the File, Edit, View, Actions, and Help drop-down menus.

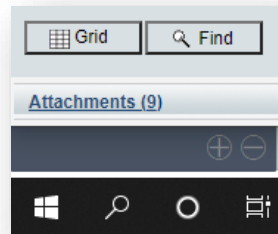


NEW: Can now access from your main task list as well as the actual task pop-up window/form in a new location. Hover over record on your task list to show gear icon and then click the gear, which allows you to Open, Accept, Decline, Undo or Print in various formats, or go to the project associated with that task (Go to Origin). In the task pop-up window/form itself, click the menu options button in upper right to find similar options.

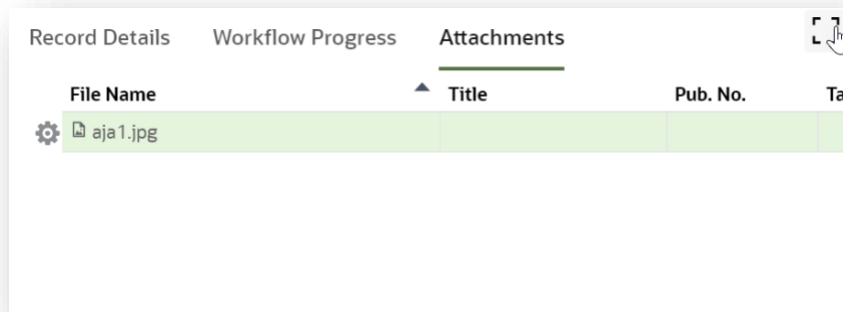


### 7.3. Attachments – New Location to view and add attachments

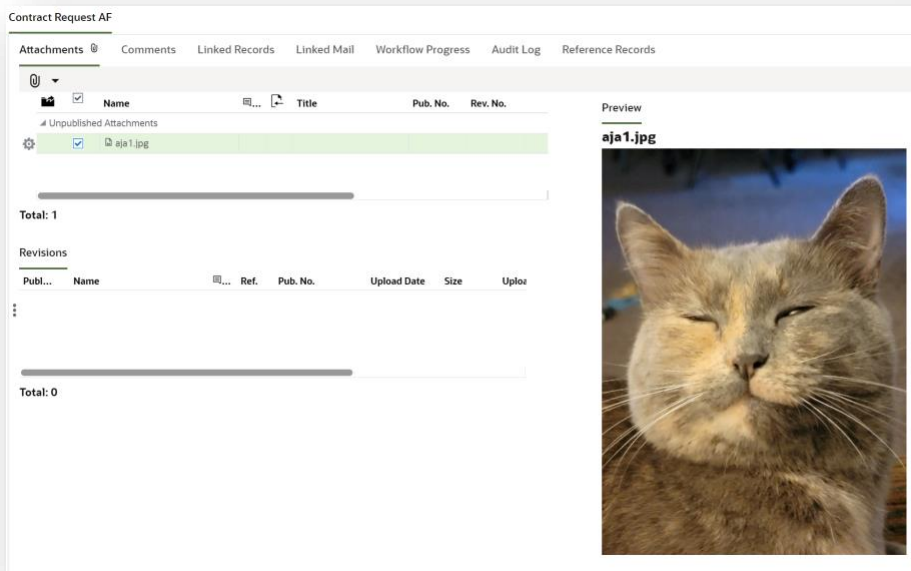
PRIOR: Located on the bottom left corner of the task pop-up window/form.



NEW: Located on the upper right side of the task pop-up window/form. Appears as a tab. Shows a paperclip if there are attachments linked to the task. Double-click to open an attachment – OR – Use the gear to the left of the document to open or download.

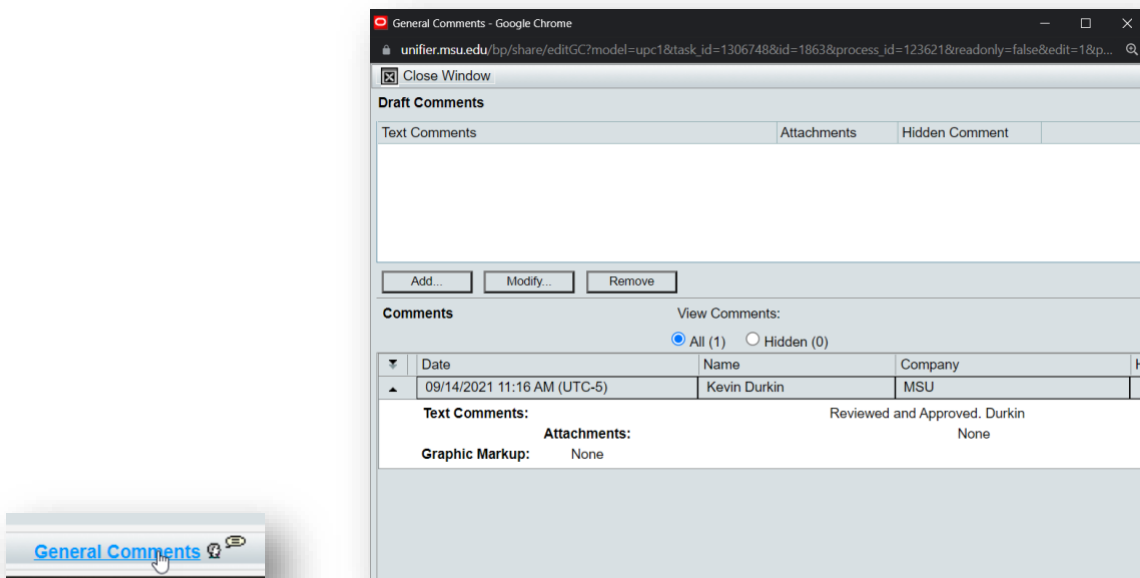


Clicking on the 'maximize' button in the upper right hand corner switches to full screen attachments section with a revisions and preview pane.



#### 7.4. Comments – view and add attachments

PRIOR: Was located at bottom of screen as a link.



NEW: New location in the tabs (speech bubble icon if comments are present)

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

Clear Post

Posted by:

Admin Chris Schut Michigan State University  
this is an example of a comment

04/29/2022 12:05 PM

7.5. Linked Records – not used

7.6. Linked Mail – not used

7.7. Workflow Progress – shows what has been done so far and who did it. Same content as before, just new location.

PRIOR:

Action Details

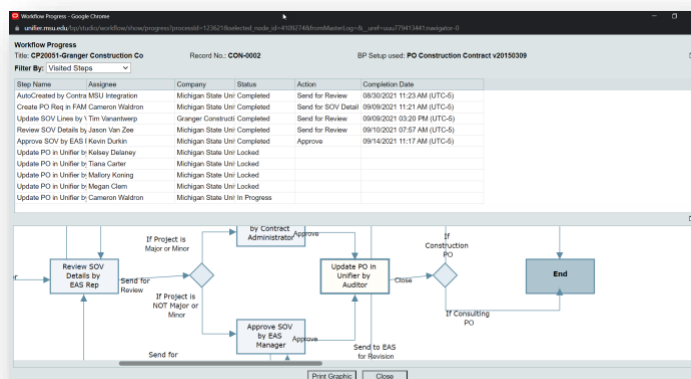
[\(Click here to view latest content\)](#)

To:

Cc:

Send For:

Task Notes:  
[Workflow Progress](#)



NEW: Click view graphic to see workflow progress – graphic (same graphic as before).

CR VF

Line Items

Attachments

Comments

Linked Records

Linked Mail

Workflow Progress

Audit Log

Reference Records

Title

Record Number

Current Step

BP Setup Used

T1-888888-123

CM-0053

Deduct Approval by Management

1- Contractor Change Order

↺↻

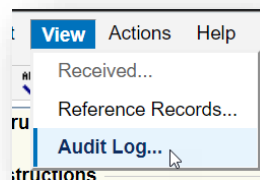
View Graphic...

Filter By: Visited Steps

Step Name	Assignee	Company	Status	Action	Completion Date
Create Contractor...	Admin Chris Schut	Michigan State U...	Completed	Send for Review	04/29/2022 12:08 PM (UTC-5)
Deduct Approval ...	Admin Chris Schut	Michigan State U...	Not Started		

7.8. Audit Log – new location in the tabs. Same information as prior.

PRIOR:



Audits - Current View: All							
22 Item(s)		Page 1 of 1		Display			
Date	Event	Action	Field	Old Value	New Value	User Name	Proxy User
05/11/2018 03:47 PM	Create	AutoCreated thru i				Anthony Rhodes: Mic	
05/11/2018 03:47 PM	Workflow>AutoCre	Send for Review			EAS Front Office, Laura		
05/18/2018 07:49 AM	Attachments	Remove 'Olds Hall				Cameron Waldron: M	
05/22/2018 06:59 AM	Workflow>Form	Modify	FAMIS Work Order		W18046495	Cameron Waldron: M	
05/22/2018 06:59 AM	Workflow>Form	Modify	Estimated Cost	0.00	5,000.00	Cameron Waldron: M	
05/22/2018 06:59 AM	Workflow>Form	Modify	Contract Cost	0.00	5,000.00	Cameron Waldron: M	
05/22/2018 06:59 AM	Attachments	Add 'Olds 1st Union	Send to		Dan Walcutt: Nielsen, P	Cameron Waldron: M	
05/22/2018 06:59 AM	Workflow>Create F	Send for SOV Data	Send to		Dan Walcutt: Nielsen, P	Cameron Waldron: M	
05/22/2018 07:21 AM	Line Items: Workflo	Add 'Pre-Construct				Pete Nielsen: Nielser	
05/22/2018 07:21 AM	Line Items: Workflo	Amount: 5,000.00				Pete Nielsen: Nielser	
05/22/2018 07:22 AM	Attachments	Add 'Olds 105 & 10	Send to		Anthony Rhodes: MSU	Pete Nielsen: Nielser	
05/22/2018 07:22 AM	Workflow>Update	Send for Review	Send to		Anthony Rhodes: MSU	Pete Nielsen: Nielser	
05/23/2018 08:11 AM	Workflow>Form	Modify	Contract Cost	5,000.00	5,000.00	Anthony Rhodes: Mic	
05/23/2018 08:11 AM	Workflow>Review	If Project is NOT M	Send to		Jeff Bonk: MSU	Anthony Rhodes: Mic	
05/23/2018 01:22 PM	Workflow>Approve	Approve	Send to		EAS Front Office, Laura	Jeff Bonk: Michigan	
05/30/2018 08:35 AM	Workflow>Form	Modify	Contract Cost	5,000.00	5,000.00	Cameron Waldron: M	
05/30/2018 08:35 AM	Workflow>Form	Modify	FAMIS PO Number		426555	Cameron Waldron: M	
05/30/2018 08:35 AM	Workflow>Form	Modify	Work Type		Contractor	Cameron Waldron: M	
05/30/2018 08:35 AM	Workflow>Update	If Construction PO				Cameron Waldron: M	
05/30/2018 08:35 AM	Workflow>Update	If Construction PO			Copy to: Project Rep, Ai	Cameron Waldron: M	
12/02/2020 11:08 AM	Workflow>Form	Modify	Estimated Cost	5,000.00	5,000.00	Taylor Smith: Michigs	
12/02/2020 11:08 AM	Workflow>Form	Modify	Contract Cost	5,000.00	5,000.00	Taylor Smith: Michigs	

NEW:

CR VF Line Items

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

**Audit Log: CM-0053**

Date	Event	Action	Field	Old Value
04/29/2022 12:08 PM	Workflow>Create Contract...	MSU Creates and LTE 0	Send to	

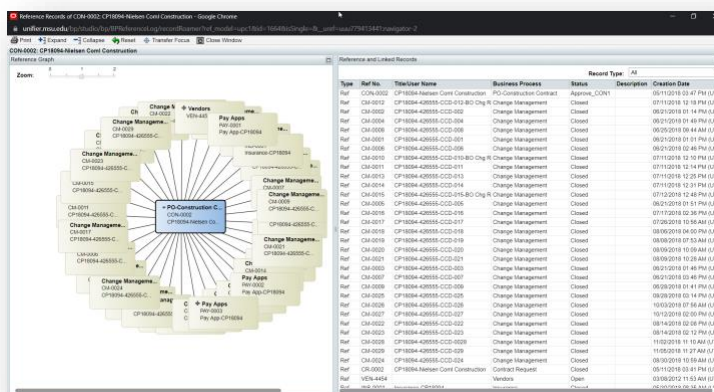
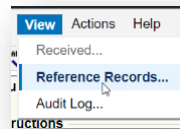
Total: 1

**Audit Details**

Date	Field
04/29/2022 12:08 PM	Send to
Project Name	Old Value
Event	New Value
Workflow>Create Contract... Contractor Change	Admin Chris Schut: MSU
Action	User Name
MSU Creates and LTE 0	Admin Chris Schut: Michigan State University
Attachment	Proxy User

7.9. Reference Records – shows all records referencing or referenced by this record (same functionality as before).

PRIOR:



NEW: New location in tabs that first shows the list. Select ‘View Graphic...’ to get the graphic version.

CRVF

Line Items

Attachments

Comments

Linked Records

Linked Mail

Workflow Progress

Audit Log

Reference Records

View Graphic...

Reference Records

Type	Ref No.	Title/User Name	Business Process	Status	Description	Creator
	CM-0053	T1-888888-123	Change Managem...	Pending		04/29/2022
	RFI-0001	RFI Test	RFIs	Closed		06/11/2018
	CON-0011	T1-Chris Schut LLC	PO-Construction C...	Approve_CON1		04/18/2018

Total: 3

Record Details

User Information

Is this your task? If so, detailed instructions are available after you accept the task.

Need Help?

<http://us.promapp.com/lp/msu/Process/Minimode/Permalink/E312Ccoj>

Project Information

Project Name

Staging Functional Test Project

Project Number

T1

General

Record Number

CM-0053

Creator

Admin Chris Schut

Title

T1-888888-123

Creator Company

MSU

Reference Records - Graphic

Business Process

All

Display

Reference and Linked Re

Transfer Focus

Reset

Display

20

Per Node

PO-Construct...

CON-0011

T1-Chris Schut LLC

Approve\_CON1

Change Man...

CM-0053

T1-888888-123

Pending

RFIs

RFI-0001

RFI Test

Closed

T...

Ref No.

Title/User Name

Business Process

Status

Change Management : CM-0053

CM-0053

T1-888888-123

Change Managem...

Pending

RFI-0001

RFI Test

RFIs

Closed

CON-0011

T1-Chris Schut LLC

PO-Construction C...

Approve...

Total: 3



7.10. Action Form Tab ‘Task Name AF’ (as before, the tab is named by the type of task you are working on followed by the letters ‘AF’, short for Action Form) – this is where you fill in the form with information.

PRIOR:

The screenshot shows a web application window titled "PO-Construction Contract". Inside, there's a tab labeled "PO Update Auditor AF". The form is divided into several sections:

- User Instructions:** A text block explaining the auditor's role in updating FAMIS purchase and work order numbers. It includes a "Need Help?" link.
- Project Information:** Fields for "Project Name" (VETERINARY MEDICAL CENTER - SANITARY DRAIN REPLACEMENT) and "Project Number" (CP20051).
- General:** Fields for "Record Number" (CON-0002), "Title" (CP20051-Granger Construction Co), "Status" (Pending), "Project Type" (PO), "Creator" (MSU Integration), "Creator Company" (MSU), and "Creation Date" (08/30/2021 11:23 AM (UTC-5)).
- Work Scope and Estimate:** A text area for "Work Scope" containing details about plumbing replacement under the Orthopedic and NCU area. Below it is a "Contract Cost" field showing "\$125,196.00".

NEW: Located as a tab in the left pane of the task window. Same format as before depending upon the task being performed. Fill out the fields as usual.

The screenshot shows a "Change Management" window with a tab labeled "CR EAS Quote Review Rep AF". The form is organized into three main sections:

- User Instructions:** A text block providing instructions on reviewing the attached quote and determining its reasonableness. It includes a "Need Help?" link.
- Project Information:** Fields for "Project Name" (Staging Functional Test Project) and "Project Number" (T1).
- General:** Fields for "Record Number" (CM-0053), "Title" (T1-8888888-123), "Status", "Creator" (Admin Chris Schut), "Creator Company" (MSU), and "Creation Date".

Blocks are collapsible/expandable by clicking the arrow on the upper left of each block

CREAS Quote Review Rep AF    Line Items

▼ **User Instructions**

Please review the attached quote to determine if it is reasonable, allowable, and its impact to the project budget. Utilize General Comments to note any concerns. You may ask the contractor to revise the quote. If the vendor was directed to provide a Quote Only, you may cancel the change request using the workflow action. If the vendor was directed to proceed with the work, do not cancel the request.

Need Help?

<http://us.promapp.com/ipfmsu/Process/Minimode/Permalink/E3I2CcojNz5tpb34PIHr3S>

> **Project Information**

> **General**

📄 **Purchase Order Reference**

Reference

CON-0011

PO Number

8888888

Vendor Name

Chris Schut LLC.

Work Type

☒ Contractor    ☐ Consultant

Pick lists such as vendor ref support smart text so you can start typing the field shown in the empty field if you know the format being asked for:

▼ **Purchase Order Reference**

Reference \*

Type a Record Number... ▼

CON-001| 🔍

CON-0011

CON-0013

CON-0014

Vendor Contact \*

You can also use the picker icon on far-right side of the field to bring up a picker list as before. You still highlight the item you want on the list and then click the 'Select' button in the bottom right corner.

**PO-Construction Contract** X

Q ≡

Project Number	Record Number	Vendor Name	FAMIS Purchase Order	PO Amount	Budget Code	Project Type	Status	Creation Date	Creator	Work Scope
T1	CON-0014			2.00	105-Contr...	Major	Approve_CON1	07/13/20...	training1 acco...	
T1	CON-0013	Howard Steel	test	20,000.00	105-Contr...	Major	Approve_CON1	06/25/20...	Jeff Smith	Testing
T1	CON-0011	Chris Schut LLC.	8888888	10,000.00	205-Desi...	Major	Approve_CON1	04/18/20...	Jeff Smith	sadfasdf
T1	CON-0009			0.00		Major	Approve_CON1	10/16/20...	Allison Peterson	
T1	CON-0008	Chris Schut L...	321	10,000.00	105-Contr...	Major	Approve_CON1	07/19/2...	Admin Chris ...	thing
T1	CON-0007	Chris Schut LLC.	test	52,200.00	105-Contr...	Major	Approve_CON1	07/18/20...	Admin Chris S...	test
T1	CON-0006	Chris Schut LLC.	testing	24,000.00	105-Contr...	Major	Approve_CON1	06/20/20...	Shawn Pohl-S...	scope of th
T1	CON-0005	Chris Schut LLC.	1	10,000.00...	105-Contr...	Major	Approve_CON1	02/17/20...	Admin Chris S...	test
T1	CON-0004	TestBidderCo...		1,000.00	180-Cons...	Major	Approve_CON1	10/07/20...	Rohini Shriba...	scope
T1	CON-0003			1,000.00	105-Contr...	Major	Approve_CON1	10/07/20...	Rohini Shriba...	R
T1	CON-0001	Mid Michigan ...	1	1,000,000...	105-Contr...	Major	Approve_CON1	07/02/20...	CJ Winger	Contract wc

**Total: 11**

7.11. 'Line Items' tab – same concept as before, new look and location.  
PRIOR:

File Edit View Actions Help

Workflow Actions: [Select-] [Send] [Save] [Spelling...] [Add Attachment] [Discussion] [Cash Flow] [Review] [Close Window]

**PO Update Auditor AF** PO-Construction Contract

**Action Details**

**Line Items**

Current View: All Show Currency In: Transaction Currency Display: 100 Items Per Page

No.	WBS Code	WBS Description	Short Description	Amount
006	105-Construction-Summary-	Construction Contract Summ	CM Paint & Repairs Allowan	\$1,000.00
005	105-Construction-Summary-	Construction Contract Summ	CM Bond & Insurance	\$2,264.00
004	105-Construction-Summary-	Construction Contract Summ	CM Fee	\$5,806.00
003	105-Construction-Summary-	Construction Contract Summ	CM Staffing	\$5,312.00
002	105-Construction-Summary-	Construction Contract Summ	Grange General Trades	\$23,184.00
001	105-Construction-Summary-	Construction Contract Summ	Myers Plumbing	\$67,630.00

☐ Show Filtered Total Amount
 Total Amount: \$125,196.00

Attachments (11)
 Linked Records (0)
 General Comments
 Linked Mail (0)

NEW: Now located as the second tab in the upper left. New 'View' options. Two methods – Form View (3 lines icon, default) and Grid View (spreadsheet icon). Grid View eliminates the 'Line Item Details' pane on the right, however it allows you to type data directly into the spreadsheet and use the gear to copy or delete line items. DON'T CLOSE FROM LINE ITEMS FORM IF EDITING! Make sure you click the 'Save' button before moving away from the Line Items tab.

Create New Change Management

CR AF Line Items

Add Actions

No.	#	WBS Code	Short Description	Estimate Amount	Change Amount	Reason Code (Legacy)	Source of Change (Legacy)
003		105-Construction-Sum...	testing	\$10.00	\$10.00		
002		105-Construction-Sum...	test 2	\$100.00	\$100.00		
001		105-Construction-Sum...	test	\$100.00	\$100.00		

Total: 3

Total Amount: \$250.00

Line Item Details Attachments Linked Records

**Modify EXISTING SOV Line**

To UPDATE an EXISTING line on the schedule of values, utilize the PO Reference field to select the existing line item from the schedule of values, the value of this change will be added to or deducted from existing schedule of value line item. In addition, the WBS code will auto-populate using the current WBS code previously defined for the schedule of value line item.

Reference PO

Type a Reference No. [icon]

**Create NEW SOV Line**

To CREATE a NEW line item on the schedule of values utilize the WBS code to select the proper budget detail. THE BUDGET CODE FOR ALL NEW LINES MUST BE THE SAME AND SHOULD MATCH THE BUDGET CODE USED ON EXISTING LINES (e.g. all lines use 105). Then complete the short description with the desired schedule of values description that the vendor will use to bill for the change.

WBS Code \*

105-Construction-Summary-00-00-00-100 [icon]

**General Information**

Complete the required fields below. The short description is displayed when invoicing for this work in the Pay Apps process. The current cost adjustment is the positive or negative amount of change to a line on the schedule of values. The current time adjustment is the number of days the schedule will be adjusted.

Short Description \*

test 2

Current Cost Adjustment \*

Cancel Save Save & Add New

Create New Change Management

CR AF Line Items

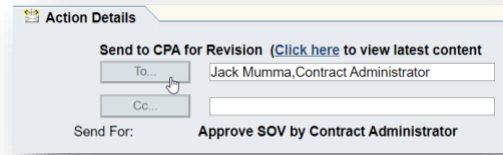
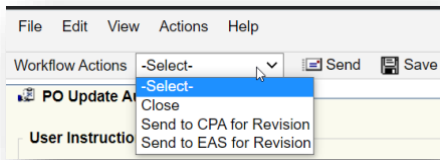
Add

No.	#	Reference PO	WBS Code *	Short Description *	Current Cost Adjustment *	Current Time Adjustment (Days) *	Original Estimated Cost *	Reason Code	Source of Change	Work Type
003		2	105-Construction-Summary...	testing	\$10.00	0	\$10.00			Contractor
002			105-Construction-Summary...	test 2	\$100.00	1	\$100.00			Contractor
001			105-Construction-Summary...	test	\$100.00	1	\$100.00			Contractor
TOTAL					\$250.00	2	\$250.00			

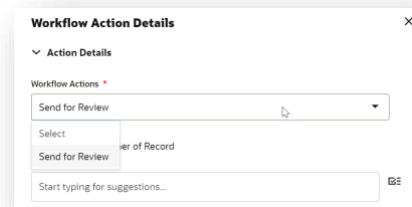
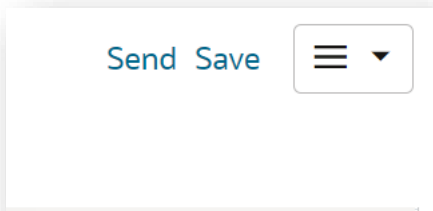
Total: 3

## 7.12. Workflow Actions

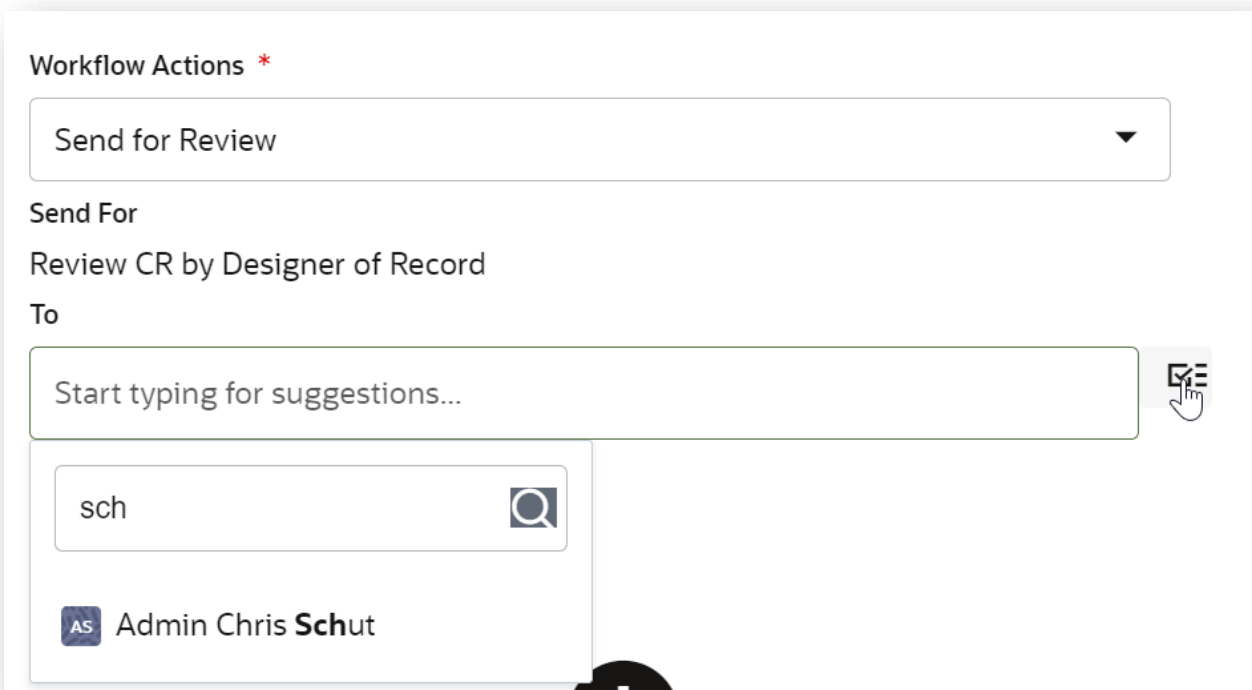
PRIOR: Was located in upper left of window. The 'To' field was in the 'Action Details' section.



NEW: New location in upper right of window. Select 'Save' to save a draft or select 'Send' to open the workflow action details to pass the task onto the next user. Use the drop-down menu to select your action.



The 'To' field will now appear. Start typing a name of a user or select the icon on the right to open the 'User and Group Picker.' Highlight the user(s) you want to send the record to and then use the '>' (add selection) button to move the user(s) to the 'Selected Items' section. Then select 'Done' in the bottom right.



User and Group Picker

View: Users/Groups

Available Items

Name	Company
<div>training9 account9</div> Michigan State Unive...	
<div>training8 account8</div> Michigan State Unive...	
<div>training7 account7</div> Michigan State Unive...	
<div>training6 account6</div> Michigan State Unive...	
<div>training5 account5</div> Michigan State Unive...	
<div>training4 account4</div> Michigan State Unive...	
<div>training3 account3</div> Michigan State Unive...	

Total: 43

Selected Items

Name	Company
<div>Users</div>	
<div>training9 account9</div> Michigan State Univ...	

Cancel

Done

This will populate the user back into the original 'Workflow Action Details' screen. Select 'Send' in the bottom right to send the record forward. Hitting this final 'Send' without filling in the required fields will highlight those required fields in red and give a list of errors and warnings showing unfilled fields.