



UniPhi 19

**Customer Relationship Management –
Clients, Sites, and Organisations
Overview**

Contents

Summary.....	3
Resources.....	4
Creating a Contact Resource.....	6
Creating Organisations and Site.....	9
Viewing External Resources.....	12
Viewing Internal Resources (Staff).....	14
Viewing Organisations & Sites.....	15
Communication.....	17
Correspondence.....	18

Summary

UniPhi's Communications module works as a fully functioning Customer Relationship Management (CRM) solution. All communications which have occurred within UniPhi are viewable in the Communications module. The aim of this manual is to provide instructions related to the creation, and the ongoing management of the CRM functionality via Organisation, Sites, and Resource Contacts.

As you read this manual, you will notice the following icon recurring which will help to highlight and enable you to quickly locate activities and summary areas.



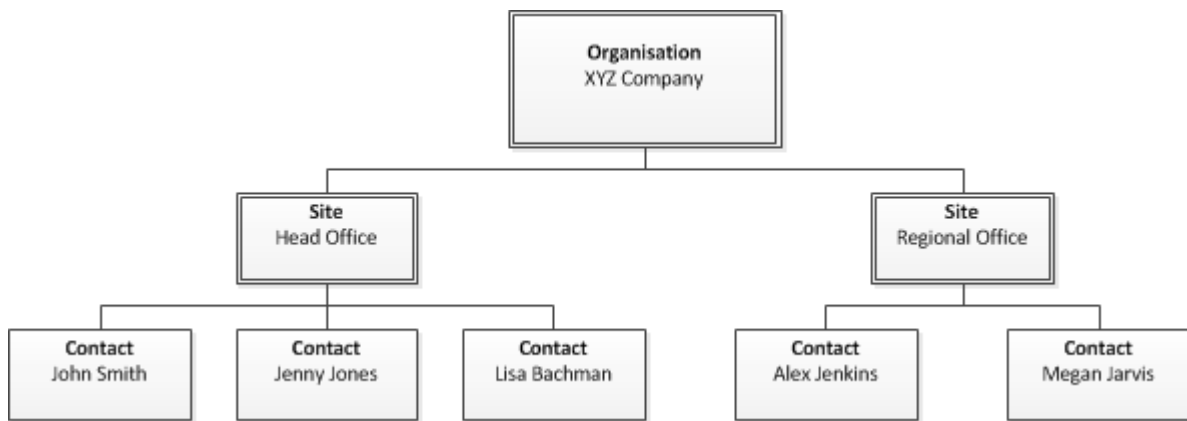
Key:

The lightbulb icon denotes a helpful hint or tip you should be aware of.

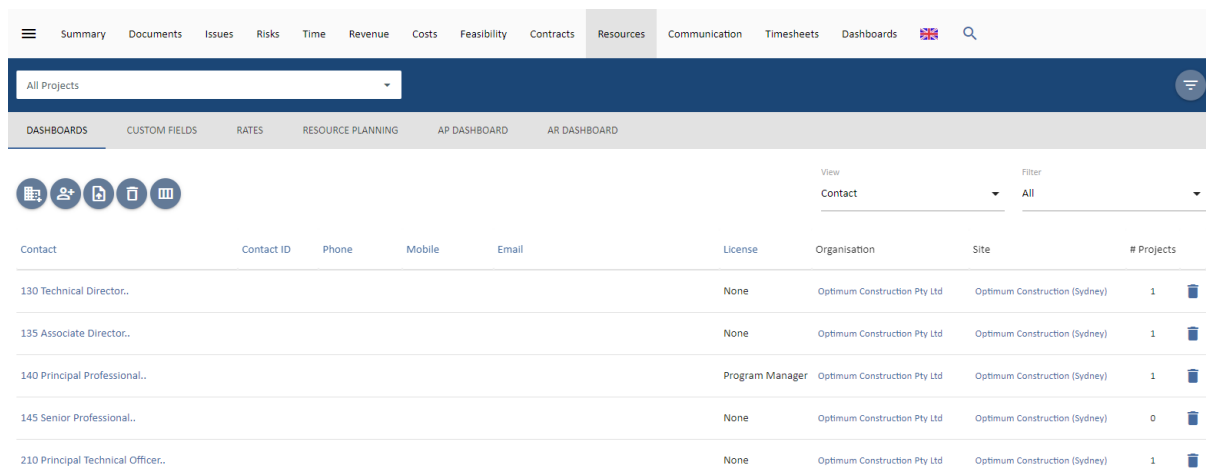
Screen shots have been used throughout the manual to demonstrate what you should be viewing as you move through the activities. They are for illustrative purposes only. Details such as dates, budget figures and other entered text/data may vary.

Resources

Within UniPhi, Resources can either be contacts (people or even just an email address) or assets. This section will focus on people as contacts. Each person’s details are entered into UniPhi via the Resource module as a Contact. Typically, a contact will also belong to a Site within an Organisation.



The information entered per contact can be captured to the level of detail that you have on the particular person and can therefore be very high level (simply a name), or at a more comprehensive and detailed level with email addresses, phone numbers, and position.



Contact	Contact ID	Phone	Mobile	Email	License	Organisation	Site	# Projects
130 Technical Director..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
135 Associate Director..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
140 Principal Professional..					Program Manager	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
145 Senior Professional..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	0
210 Principal Technical Officer..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1

Organisations are categorised as Internal and External. An internal organisation will be your own company. Sites created within an internal company are typically physical site locations of your company. Logically, any resources associated with an internal organisation’s sites would be an employee of the internal organisation.




An external organisation may also have one or more sites, and contacts. Typically, these contacts will be people who are involved or associated with a project in UniPhi – e.g., Clients, Suppliers, Advisors, etc.

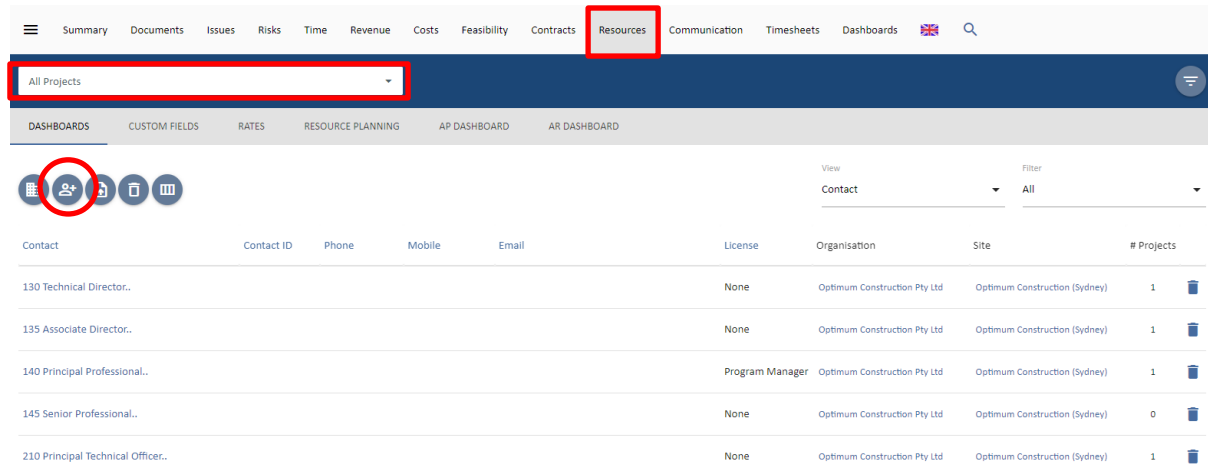
Once created, contact resources can be assigned to UniPhi projects. Filtering for a specific project will present all resources assigned to that project.

Resources can be added or removed from a particular project, and their associated information (such as contact details) can be edited at any time.

Creating a Contact Resource

You can create a resource from within a project or from the All Projects view in the Resources module.

Start by pressing the  button.



Contact	Contact ID	Phone	Mobile	Email	License	Organisation	Site	# Projects
130 Technical Director..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
135 Associate Director..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
140 Principal Professional..					Program Manager	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1
145 Senior Professional..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	0
210 Principal Technical Officer..					None	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	1

There are several contact fields that you may choose to populate immediately, though the only mandatory field that requires input at this stage is the resource Name. All other fields, such as phone numbers, email address, licence type, position, etc. can be updated or amended at a later date. Remember to save your new resource details before leaving this page.

Create Resource

Type

Contact ▼

Name

License

None ▼

Email

Ph (Direct)

Ph (Office)

Mobile

Fax

Contact ID

Position



If you want the contact to log in to UniPhi, you will need to enter their email address, select a licence, and give them a login (usually this is their email address or full name).

Once the basic details of the contact have been entered, you can link them to an organisation. Scroll down to view the three options available:

Link to an Organisation

- Link contact to existing organisation
- Link contact to a new organisation
- Individual contact only

Organisation Search

- 7 - Eleven (60 Collins St Melbourne Vic 3000)
- ABC Architects Pty Ltd (Melbourne)
- ABC Architects Pty Ltd (Sydney)
- ABC Construction (Head Office)
- AC Solutions (AC Solutions (Sydney))

- **Link contract to an existing organisation** – Allows you to search for an organisation that has been created in UniPhi. Type in the organisation name and select it from the list.
- **Link a contact to a new organisation** – provides a data entry screen to create a new organisation if it doesn't come up in the search (see Creating Organisations and Sites below).
- **Individual contact only** – use this when the contact is not associated with an organisation.

UniPhi Licenses

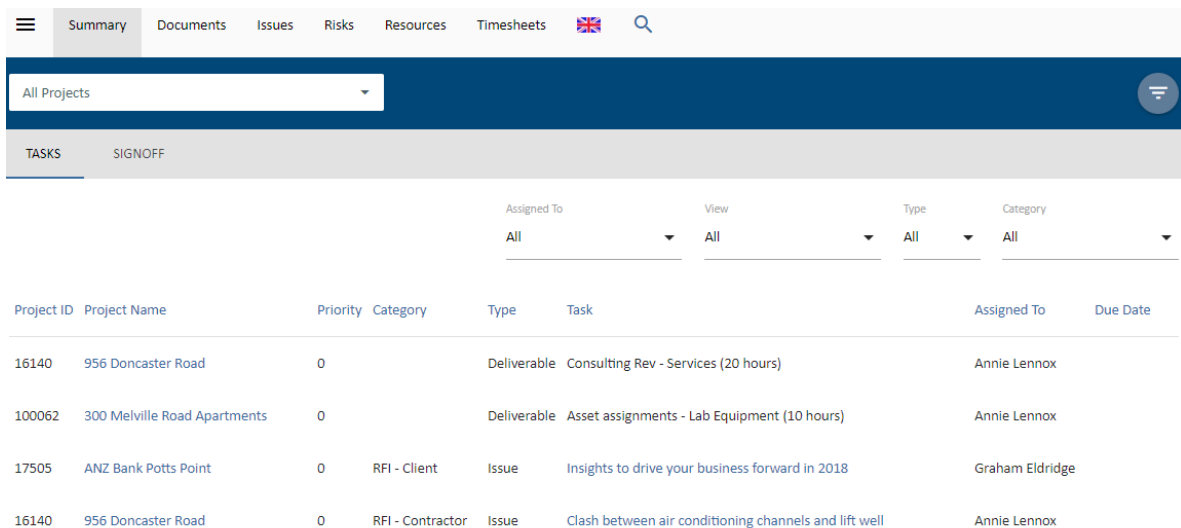
System Administrators will have the ability to assign a license to a contact to enable their access to UniPhi. The level of access that the resource will have in UniPhi will depend on the licence type that you select. There are four licence access levels:

1. Team Member
2. Project Manager
3. Program Manager
4. Administrator

Team Member Access

People assigned a Team Member licence can:

- Browse the organisations methodology, as defined by the program office (or System Administrator);
- Create documents (only with templates their role has edit rights to), issues, risks and change requests for the projects they are working on;
- View the portfolio of projects on the project summary view and via the reporting system;
- View their documentation issues and risks, and
- Search both for methodology content as well as project documentation/artefacts.



The screenshot shows the UniPhi interface with a navigation menu at the top containing 'Summary', 'Documents', 'Issues', 'Risks', 'Resources', and 'Timesheets'. Below the navigation is a search bar and a filter dropdown set to 'All Projects'. The main content area is divided into 'TASKS' and 'SIGNOFF' sections. The 'TASKS' section displays a table with the following data:

Project ID	Project Name	Priority	Category	Type	Task	Assigned To	Due Date
16140	956 Doncaster Road	0		Deliverable	Consulting Rev - Services (20 hours)	Annie Lennox	
100062	300 Melville Road Apartments	0		Deliverable	Asset assignments - Lab Equipment (10 hours)	Annie Lennox	
17505	ANZ Bank Potts Point	0	RFI - Client	Issue	Insights to drive your business forward in 2018	Graham Eldridge	
16140	956 Doncaster Road	0	RFI - Contractor	Issue	Clash between air conditioning channels and lift well	Annie Lennox	

Figure 1. Team Members see these modules only

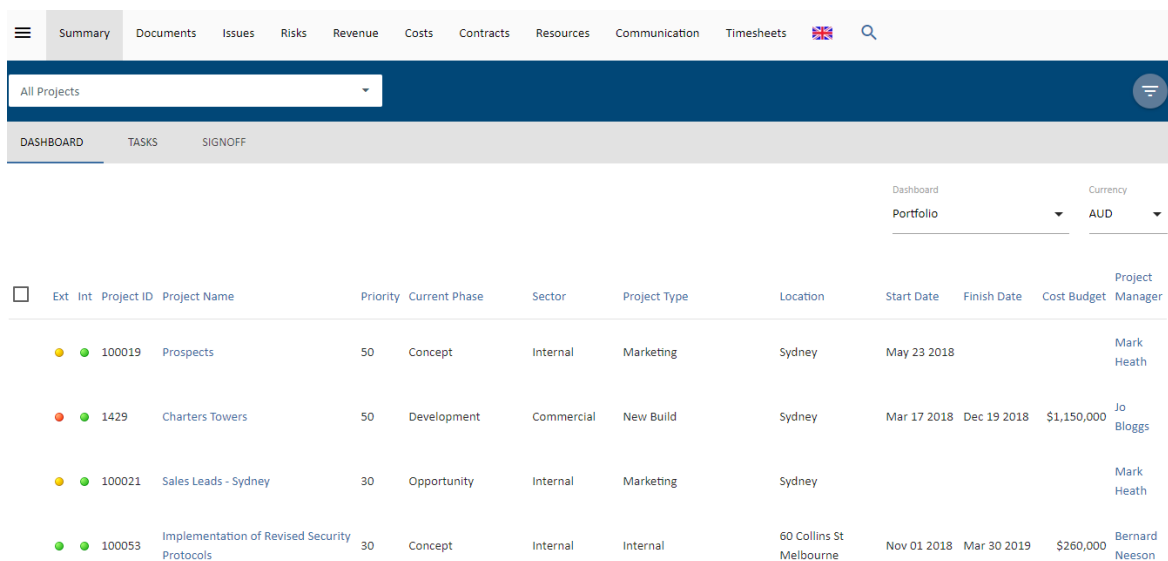
Team members cannot view:

- Financial information such as budgets
- Contract information
- Reports from within the Reports module
- Documents which have been restricted to Project Manager access level or above.

Project Manager Access

People assigned a Project Manager licence have all permissions of a Team Member, and can also:

- Assign team members to issues, and risk mitigation actions;
- Assign due dates to documents, issues, and risk mitigation actions;
- Complete bulk update of issues including assignments and due dates;
- Create contracts, budgets, variations and progress claims on their own projects;
- Update actuals and forecast to complete;
- Assign resources to their project;
- Close resolved issues, including those that are set to "awaiting review".



Ext	Int	Project ID	Project Name	Priority	Current Phase	Sector	Project Type	Location	Start Date	Finish Date	Cost Budget	Project Manager
●	●	100019	Prospects	50	Concept	Internal	Marketing	Sydney	May 23 2018			Mark Heath
●	●	1429	Charters Towers	50	Development	Commercial	New Build	Sydney	Mar 17 2018	Dec 19 2018	\$1,150,000	Jo Bloggs
●	●	100021	Sales Leads - Sydney	30	Opportunity	Internal	Marketing	Sydney				Mark Heath
●	●	100053	Implementation of Revised Security Protocols	30	Concept	Internal	Internal	60 Collins St Melbourne	Nov 01 2018	Mar 30 2019	\$260,000	Bernard Neeson

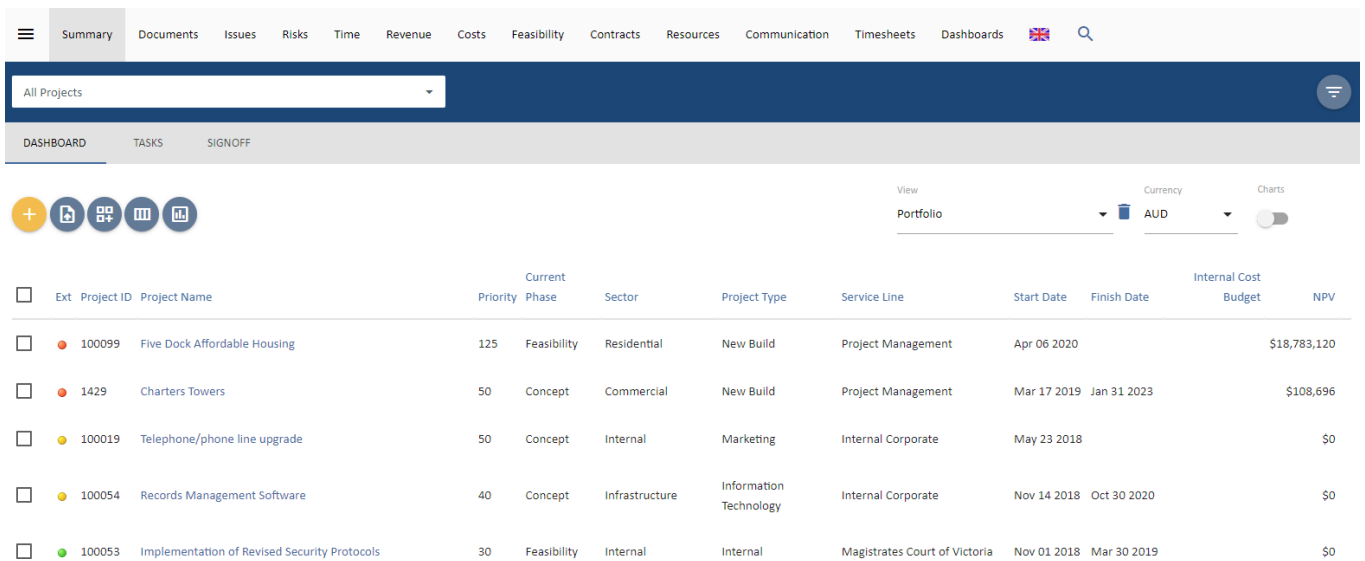
Figure 2 The Project Managers view – My Portfolio

Project Manager cannot view:

- Projects within the portfolio that they are not assigned as to a resource
- Budget information for projects that they are not assigned to
- Contracts for projects that they are not assigned to
- Risks and Issues for projects that they are not assigned to.

People assigned a Program Manager Licence have all permissions of the Project Manager, and can also:

- View projects, risks and financial information across the entire portfolio of the organisation.
- Assess and Analyse profitability, track backlog and burn rates and have access to contracts across the organisation.
- Access portfolio dashboard and create progress reports for all functions available in UniPhi.



<input type="checkbox"/>	Ext	Project ID	Project Name	Priority	Current Phase	Sector	Project Type	Service Line	Start Date	Finish Date	Internal Cost Budget	NPV
<input type="checkbox"/>	•	100099	Five Dock Affordable Housing	125	Feasibility	Residential	New Build	Project Management	Apr 06 2020		\$18,783,120	
<input type="checkbox"/>	•	1429	Charters Towers	50	Concept	Commercial	New Build	Project Management	Mar 17 2019	Jan 31 2023	\$108,696	
<input type="checkbox"/>	•	100019	Telephone/phone line upgrade	50	Concept	Internal	Marketing	Internal Corporate	May 23 2018		\$0	
<input type="checkbox"/>	•	100054	Records Management Software	40	Concept	Infrastructure	Information Technology	Internal Corporate	Nov 14 2018	Oct 30 2020	\$0	
<input type="checkbox"/>	•	100053	Implementation of Revised Security Protocols	30	Feasibility	Internal	Internal	Magistrates Court of Victoria	Nov 01 2018	Mar 30 2019	\$0	

Figure 4 The Program Managers view – My Portfolio



bernard
ProgramManager

Logout

Modules

Reporting

Reports

Dashboards

Methodology

Figure 4 Program Managers view – Side Menu.

Program Manager cannot

- View or edit items within the Configuration modules,
- Modify or delete document templates, or other custom fields. These tasks are performed only by the administrator.

Administrator Access

People assigned an Administrator has full permissions to every aspect of UniPhi and can make all necessary configuration changes.

Creating Organisations and Sites

When creating an Organisation, it is essential that at least one site is created. Once an organisation and site have been created it is possible to create numerous sites within an organisation.

Organisations and sites are usually created from within the Resources module, though they can also be created while a new resource contact is being created.

Create Organisation

Organisation Internal Organisation

Email Company Number Tax Number

URL Bank Name Account Name

BSB Account No

Primary Site

Site Name Ph (Office) Fax

Street 1 Street 2 Suburb State Postcode Country




  

Figure 6 Creating an Organisation in the Resources module

As is the case when creating new contact resources, you will be presented with several detail fields that can be populated with Organisation specific information. The only mandatory field at this stage is the Organisation name, and the primary site details. Obviously, the more details you have entered here, the more useful your resource information will be, particularly when performing tasks such as generating documents, or invoices, etc.

Create Organisation

Organisation
Highway Contructions Pty Ltd Internal Organisation

Email accounts@HWCL.COM.AU	Company Number 123456789	Tax Number www.hwcl.com.au
URL www.hwcl.com.au	Bank Name Chase	Account Name HWCL Aus
BSB 012456	Account No 123456789	

Primary Site

Site Name Main Office			Ph (Office) 0212345678	Fax	
Street 1 742	Street 2 Evergreen Terrace	Suburb Sydney	State NSW	Postcode 2000	Country Australia










Figure 7 Organisation Details

Once you have created an Organisation and Primary Site details, press save  . Or you can save and drill  and add additional sites by pressing the yellow Add Sites button.

Sites



The Organisation should be marked as Internal if this is your organisation so that resources assigned to your organisation are recognised as internal employees. Leaving the Internal box un-ticked will treat the organisation, and all associated sites and resources as being external (e.g. a supplier or a client).

Organisation Details

Organisation
3rd Party IT Solutions

Email
info@3rdpartyitsoultion.com.au

Company Number	Tax Number
123456789	2000

URL	Internal
www.3rdpartyitsoultion.com.au	<input checked="" type="checkbox"/>

To link existing contact resources to a site, simply drill into the specific site, and press the Link Resources button.

Resources




As seen above, the user also has the ability to create a new resource in this screen by pressing the Create Resource button.




Viewing External Resources

Navigating resource contact information via the Resources module is quite straight forward. Filters exist to help narrow down the resource list you are viewing. The View filter allows you to look at the list of either Contacts, Organisations, or sites. The Filter drop down (next to View) allows you to view internal, external, or all resources.

Clicking onto a resource will take you to the detail screen for that person. Here you will find more of the specific information about the person, and the company (or companies) that they belong to. It is possible to have one contact linked to numerous organisations and sites. Where a contact is linked to more than one organisation, you will need to specify their “Primary Site”.

Organisation & Sites



Organisation	Site	Address	Suburb	State	Postcode	Country	Primary Site
Gateshead Health NHS Foundation Trust	Trust Headquarters	Queen Elizabeth Hospital Sheriff Hill	Gateshead	Tyne & Wear	NE9 6SX	United Kingdom	  

Comments

The comments panel is designed to capture informal information that relates to a particular contact. The comments that are captured here should be those that don’t require any further activity or follow up, but may be relevant to refer to in subsequent conversations or discussion.

Note: if your conversation does require further action or follow up, you would create an issue and assign tasks and due dates

Over time your conversation thread may grow in size. If you need to locate a comment that has been made by a specific person, you can select that person from the dropdown box. This will then display only those comments made by the person selected.

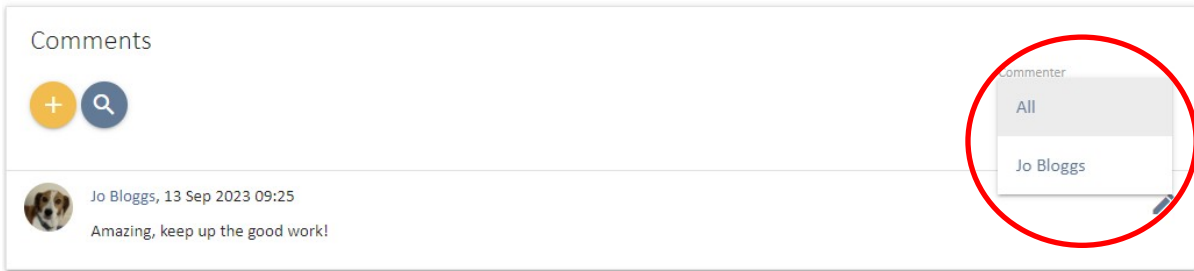


Figure 8 Filter by commenter

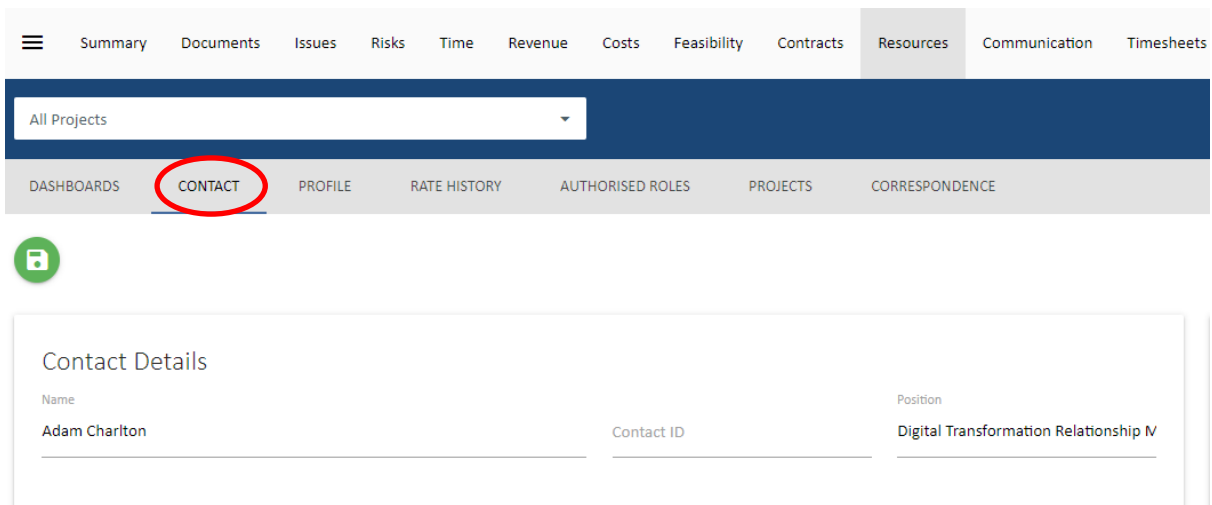


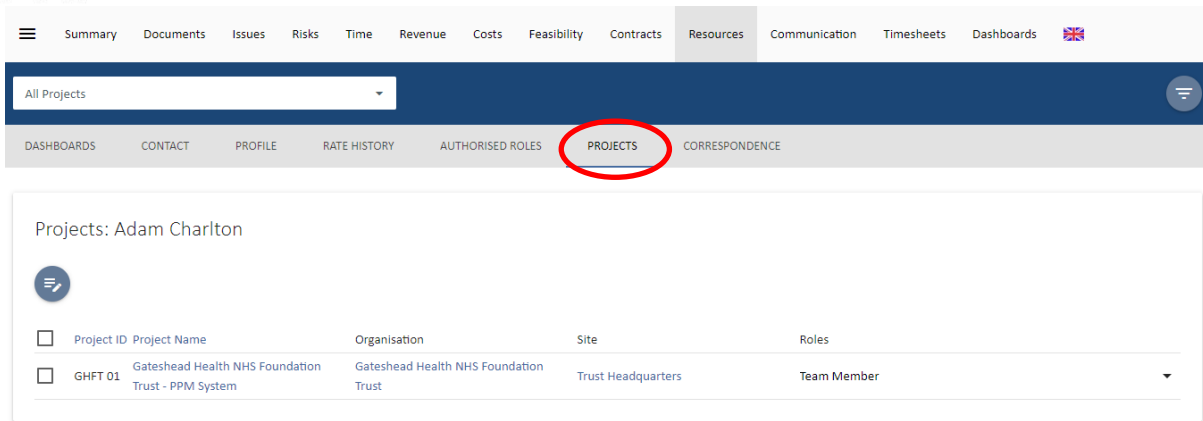
Figure 9 Sub Navigations views

The Sub navigation menu for a contact provides access to the following views:

- Dashboards – the resource pool
- Contact – edit and update contact details
- Rate History – for internal resources, review their charge and cost rate history
- Authorised Roles – for internal resources, review the roles they are authorised to be assigned to
- Projects – review the list projects and roles the contact is assigned to (see below)
- Correspondence – review any correspondence with this contact (see below)

Projects

The information displayed in this view is a useful way to observe which projects a contact resource has been assigned to, and the role that they are performing within those projects.



Project ID	Project Name	Organisation	Site	Roles
GHFT 01	Gateshead Health NHS Foundation Trust - PPM System	Gateshead Health NHS Foundation Trust	Trust Headquarters	Team Member

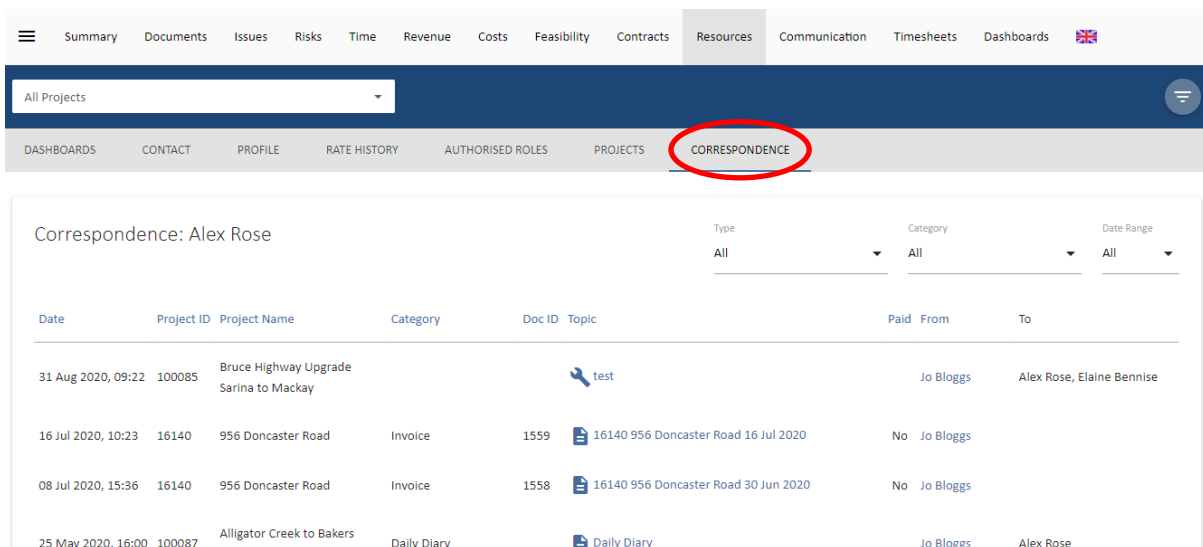
Figure 10 Projects displays allocated projects and roles per contact resource

For more information on how contacts can be assigned and updated to projects, see the internal users section below for details.

Correspondence

The correspondence panel displays all UniPhi generated interactions that have taken place involving the resource contact that you have selected. This correspondence includes documents, issues, comments, and emails. It's important to note that all communications are displayed here, regardless of their status (e.g. issues are displayed even if they are closed or awaiting review). Items from closed projects are also displayed.

The benefit to using the Correspondence module to locate information is that it brings all of the information into one place, and eliminates the need to open multiple browser tabs to locate a specific item.



Date	Project ID	Project Name	Category	Doc ID	Topic	Paid	From	To
31 Aug 2020, 09:22	100085	Bruce Highway Upgrade Sarina to Mackay			test		Jo Bloggs	Alex Rose, Elaine Bennise
16 Jul 2020, 10:23	16140	956 Doncaster Road	Invoice	1559	16140 956 Doncaster Road 16 Jul 2020	No	Jo Bloggs	
08 Jul 2020, 15:36	16140	956 Doncaster Road	Invoice	1558	16140 956 Doncaster Road 30 Jun 2020	No	Jo Bloggs	
25 May 2020, 16:00	100087	Alligator Creek to Bakers	Daily Diary		Daily Diary		Jo Bloggs	Alex Rose

Figure 11 Resource Contact Correspondence view

Viewing Internal Resources (Staff)

The contact details for internal resources (staff) features the capability to attach a signature image, and an email signature. This information can then be used when generating and transmitting documents and emails from UniPhi.

Signatures

Document Signature

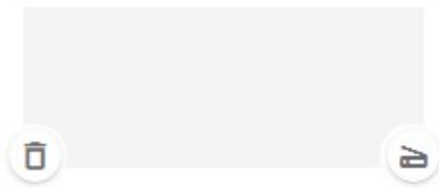


Figure 12 Scanned copies of signatures can be attached to a resource contact



The *Document Signature* is a scanned image of a written signature that is uploaded into UniPhi, which can then be selected when “signing off” a document. The output document has the embedded signature attached, which saves the time and effort of printing a document, signing it, and then scanning it back as a soft copy format. Attaching an *email signature* works the same way that most email programs (e.g. Outlook) allow you to attach a predefined email signature. Again, this is a time saving feature as all of your outbound emails from UniPhi will appear with your customised signature information, which may include contact details, and your company logo.

The following sub navigation views may be useful in managing internal staff access to UniPhi:

Authorised Roles

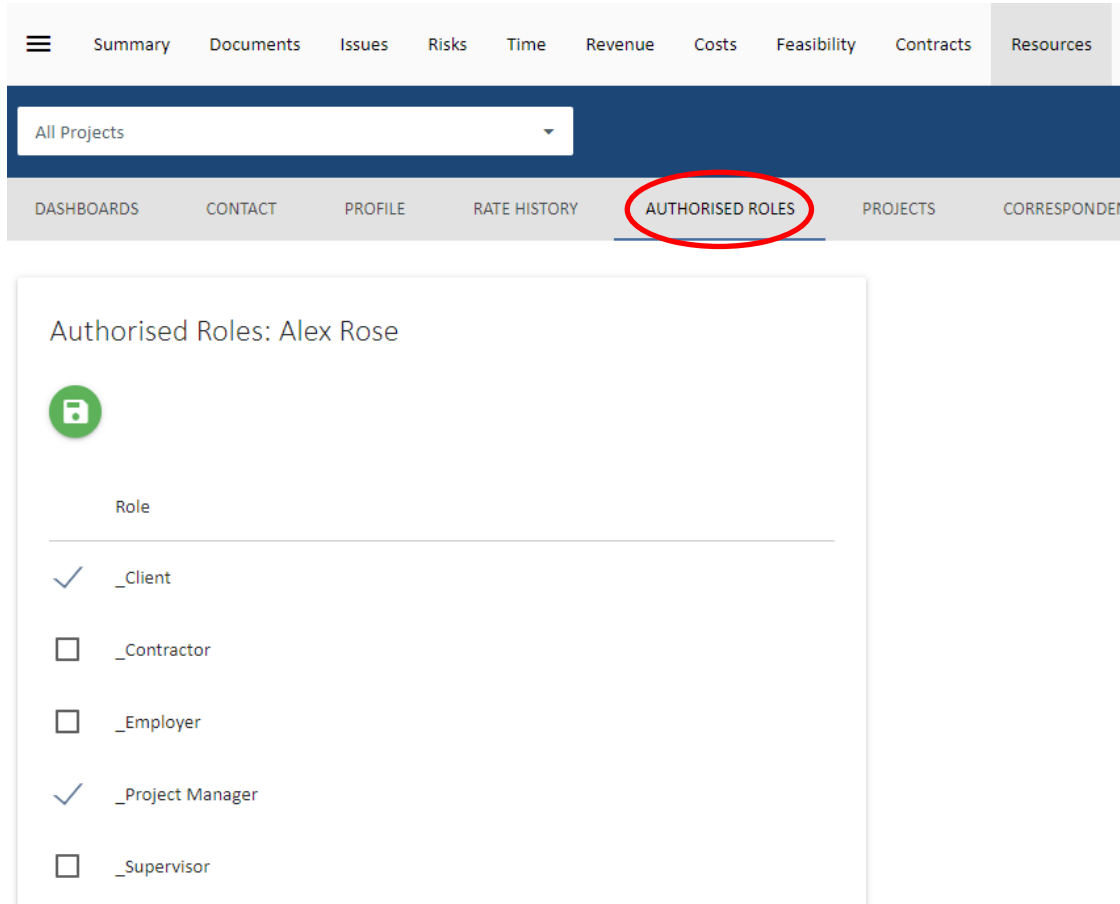
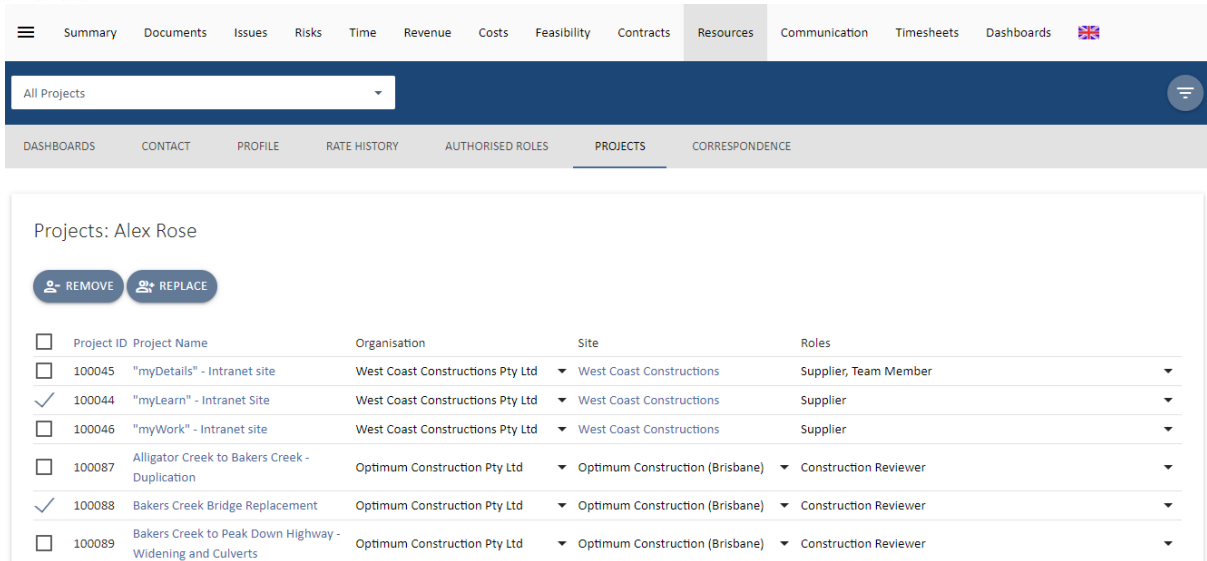


Figure 13 Authorised Roles

The Authorised Roles sub navigation provides a list of available roles that can be assigned to a user. If any of these is checked, the user will be limited to those roles on a project. If none are checked, then the role allocation is only limited according to the user's license.



Projects Sub navigation for Internal Staff

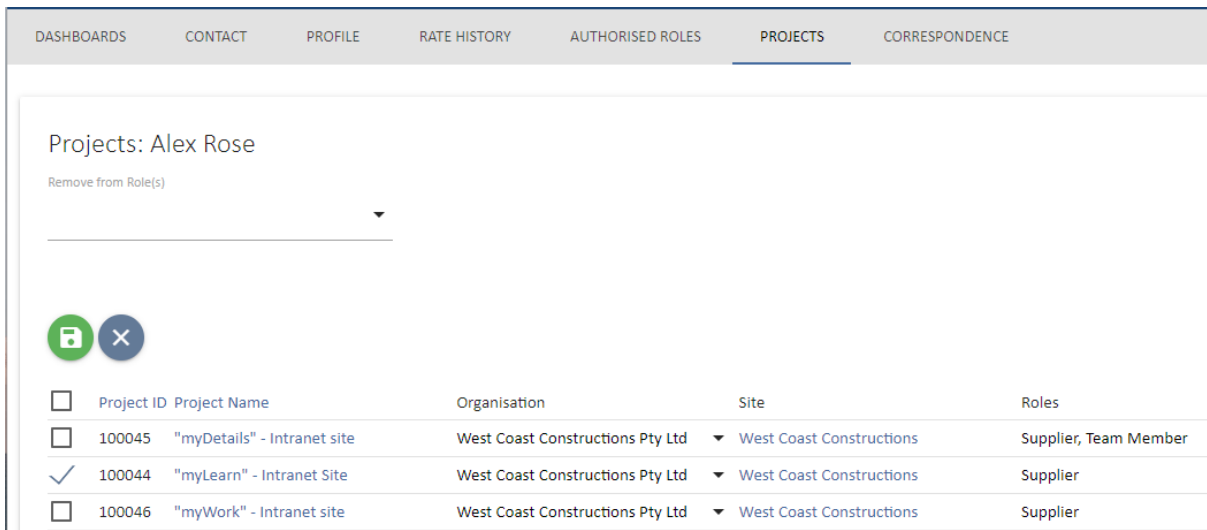
The Projects sub navigation provides a number of options for managing an internal user's access to UniPhi projects.





Project ID	Project Name	Organisation	Site	Roles
<input type="checkbox"/>	100045 "myDetails" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier, Team Member
<input checked="" type="checkbox"/>	100044 "myLearn" - Intranet Site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier
<input type="checkbox"/>	100046 "myWork" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier
<input type="checkbox"/>	100087 Alligator Creek to Bakers Creek - Duplication	Optimum Construction Pty Ltd	Optimum Construction (Brisbane)	Construction Reviewer
<input checked="" type="checkbox"/>	100088 Bakers Creek Bridge Replacement	Optimum Construction Pty Ltd	Optimum Construction (Brisbane)	Construction Reviewer
<input type="checkbox"/>	100089 Bakers Creek to Peak Down Highway - Widening and Culverts	Optimum Construction Pty Ltd	Optimum Construction (Brisbane)	Construction Reviewer

Figure 14 Projects view with selections made

Select projects from the list displayed and two additional buttons will appear, Remove  and Replace .




Remove from Role(s)

Project ID	Project Name	Organisation	Site	Roles
<input type="checkbox"/>	100045 "myDetails" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier, Team Member
<input checked="" type="checkbox"/>	100044 "myLearn" - Intranet Site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier
<input type="checkbox"/>	100046 "myWork" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier

Figure 15 Projects view Remove option

The Remove option provides a drop down to select what roles you want to remove the user from.

Select Remove  again to complete the task. This option is useful to remove someone from projects after they have left an organisation or changed roles.

DASHBOARDS CONTACT PROFILE RATE HISTORY AUTHORISED ROLES **PROJECTS** CORRESPONDENCE

Projects: Alex Rose

Resource: Role(s):

<input type="checkbox"/>	Project ID	Project Name	Organisation	Site	Roles
<input type="checkbox"/>	100045	"myDetails" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier, Team Member
<input checked="" type="checkbox"/>	100044	"myLearn" - Intranet Site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier
<input type="checkbox"/>	100046	"myWork" - Intranet site	West Coast Constructions Pty Ltd	West Coast Constructions	Supplier
<input type="checkbox"/>	100087	Alligator Creek to Bakers Creek - Duplication	Optimum Construction Pty Ltd	Optimum Construction (Brisbane)	Construction Reviewer
<input checked="" type="checkbox"/>	100088	Bakers Creek Bridge Replacement	Optimum Construction Pty Ltd	Optimum Construction (Brisbane)	Construction Reviewer

Figure 16 Projects view Replace option

The Replace option provides two drop down lists, one to select the resource replacing the user and the other to select the role that you will place the new user into on the selected projects. Press

Replace again to complete the task. In the example above, Eva Chang will be replaced by Chris Martin as Project Manager on the Crown Plaza Tower Project. This is useful to replace staff going on leave or when project roles change.

Figure 17 Bulk Edit Projects option


Summary Documents Issues Risks Time Revenue Costs Feasibility Contracts Resources Communication Timesheets Dashboards

All Projects

DASHBOARDS CONTACT RATE HISTORY AUTHORISED ROLES **PROJECTS** CORRESPONDENCE

Project Role Matrix: 130 Technical Director..


Project ID	Project	_Client	_Contractor	_Employer	_Project	Account	Construction	Contract	Cost	Development	Empl					
				Manager	Supervisor	Manager	Architect	Client	Client	Reviewer	Consultant	Administrator	Contractor	Manager	Manager	
100045	"myDetails" - Intranet site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100044	"myLearn" - Intranet Site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100046	"myWork" - Intranet site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100062	300 Melville Road Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100050	489 Bell Street Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100061	500 Toorak Road Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100091	537 Bell Street Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100092	567 Bell Street Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100100	587 Bell Street Apartments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16140	956 Doncaster Road	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100109	A406 Hangars Lane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
100111	A406 Hangars Lane - Concept Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Summary Documents Issues Risks Time Revenue Costs Feasibility Contracts Resources Communication Timesheets Dashboards 

All Projects

DASHBOARDS CONTACT PROFILE RATE HISTORY AUTHORISED ROLES **PROJECTS** CORRESPONDENCE

Projects: 130 Technical Director..



<input type="checkbox"/>	Project ID	Project Name	Organisation	Site	Roles
<input type="checkbox"/>	100094	Surry Hills Affordable Housing	Optimum Construction Pty Ltd	Optimum Construction (Sydney)	PMO Manager, Project Engineer



The third option is to bulk edit the project and role allocations of the user. Select this and a list of all available projects and roles will display. If this list is too long, you can apply portfolio filters to it. Select the roles and the projects the user needs to be assigned to and select save. You can also deselect them from any existing roles to remove them from the project.

This option is designed to quickly add and remove a user to a project or multiple projects.

Viewing Organisations & Sites

Viewing Organisations at the highest level will display information about all the sites that you have entered into UniPhi. At this high level, you can see details such as the name of the organisations, the number of sites related to the organisation, and the number of people assigned. Each of the headings are sortable, so you can sort organisations alphabetically, or by the number of assigned sites, or number of people assigned.

DASHBOARDS										
CUSTOM FIELDS										
RATES										
RESOURCE PLANNING										
AP DASHBOARD										
AR DASHBOARD										
View						Filter				
Organisation						Internal				
Organisation	Company Number	Tax Number	# Sites	# People	# Supplier Contracts	Supplier Contract Value	# Customer Contracts	Customer Contract Value	AP Balance	AR Balance
Optimum Construction Pty Ltd	1235 8972		2	35	71	16,385,192.11	103	182,590,954.14		
UniPhi (Aus) Pty Ltd			1	6	13	5,839,550.50	10	8,609,509.40		

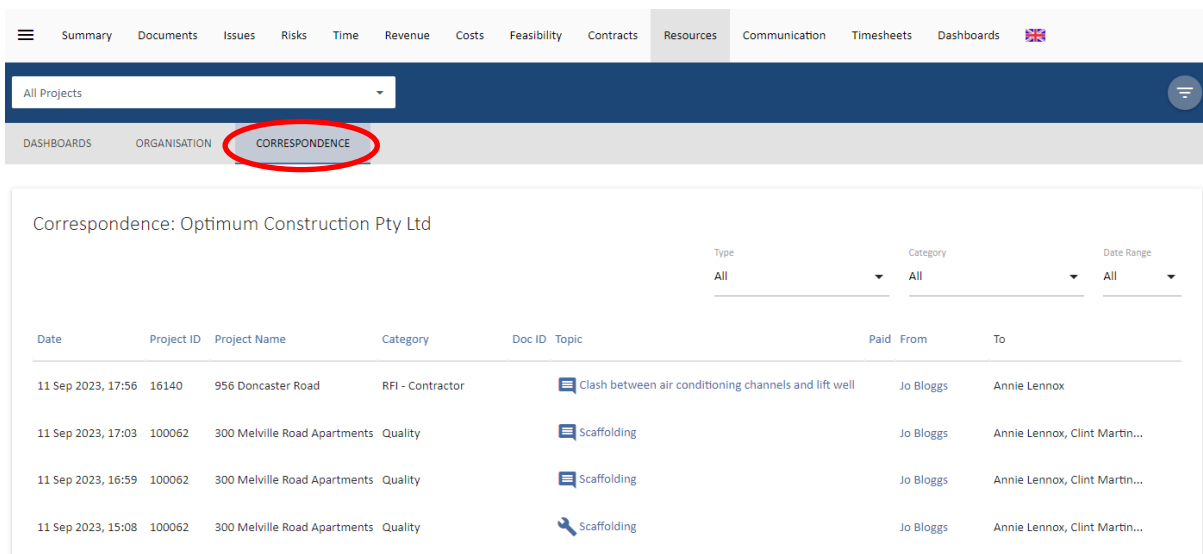
Clicking into an organisation will display the organisation-specific information, such as the company website, ABN, email address and the bank details. These details can be entered or amended at any time.

DASHBOARDS																																					
ORGANISATION																																					
CORRESPONDENCE																																					
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <h3>Sites</h3> <table border="1"> <thead> <tr> <th>Site</th> <th>Address</th> <th>Suburb</th> <th>State</th> <th>Country</th> <th>Phone</th> <th>Fax</th> </tr> </thead> <tbody> <tr> <td>Optimum Construction (Brisbane)</td> <td>12/200 Queen St</td> <td>Brisbane</td> <td>QLD</td> <td>Australia</td> <td>07 3568 5566</td> <td>07 3568 7752</td> </tr> <tr> <td>Optimum Construction (Sydney)</td> <td>39 Blaxland St</td> <td>Millsons Point</td> <td>NSW</td> <td>Australia</td> <td>02 9568 8965</td> <td>02 9568 8855</td> </tr> </tbody> </table> </div> <div style="width: 45%;"> <h3>Organisation Details</h3> <p>Organisation Optimum Construction Pty Ltd</p> <p>Email Info@optimum.com.au</p> <p>Company Number 1235 8972</p> <p>URL www.optimumsolutions.com.a</p> <p>Internal <input checked="" type="checkbox"/></p> </div> </div>										Site	Address	Suburb	State	Country	Phone	Fax	Optimum Construction (Brisbane)	12/200 Queen St	Brisbane	QLD	Australia	07 3568 5566	07 3568 7752	Optimum Construction (Sydney)	39 Blaxland St	Millsons Point	NSW	Australia	02 9568 8965	02 9568 8855							
Site	Address	Suburb	State	Country	Phone	Fax																															
Optimum Construction (Brisbane)	12/200 Queen St	Brisbane	QLD	Australia	07 3568 5566	07 3568 7752																															
Optimum Construction (Sydney)	39 Blaxland St	Millsons Point	NSW	Australia	02 9568 8965	02 9568 8855																															
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <h3>Resources</h3> <table border="1"> <thead> <tr> <th>Contact</th> <th>Internal</th> <th>Position</th> <th>Phone</th> <th>Mobile</th> <th>Email</th> <th>License</th> </tr> </thead> <tbody> <tr> <td>130 Technical Director..</td> <td>Y</td> <td></td> <td></td> <td></td> <td></td> <td>None</td> </tr> <tr> <td>135 Associate Director..</td> <td>Y</td> <td></td> <td></td> <td></td> <td></td> <td>None</td> </tr> <tr> <td>140 Principal Professional..</td> <td>Y</td> <td></td> <td></td> <td></td> <td></td> <td>Program Manager</td> </tr> </tbody> </table> </div> <div style="width: 45%;"> <h3>Bank Details</h3> <p>Bank Name NAB</p> <p>Account Name Optimum Trading A/C</p> <p>BSB 012-34500</p> <p>Account No 9998658</p> </div> </div>										Contact	Internal	Position	Phone	Mobile	Email	License	130 Technical Director..	Y					None	135 Associate Director..	Y					None	140 Principal Professional..	Y					Program Manager
Contact	Internal	Position	Phone	Mobile	Email	License																															
130 Technical Director..	Y					None																															
135 Associate Director..	Y					None																															
140 Principal Professional..	Y					Program Manager																															

Figure 19 Drilled in to an Organisation

The Organisation view also displays the Sites and Resource section. Sites is a list of sites associated with the organisation, while Resources is a detailed list of all resources linked to that organisation.

The Correspondence sub navigation displays all forms of direct interaction that have occurred between your company and the resource that you are viewing. You can view all correspondence which has occurred by clicking into a specific contact, site, or organisation. The correspondence list is contextualised to the resource that you have specified. This makes reviewing the correspondence items more focussed.



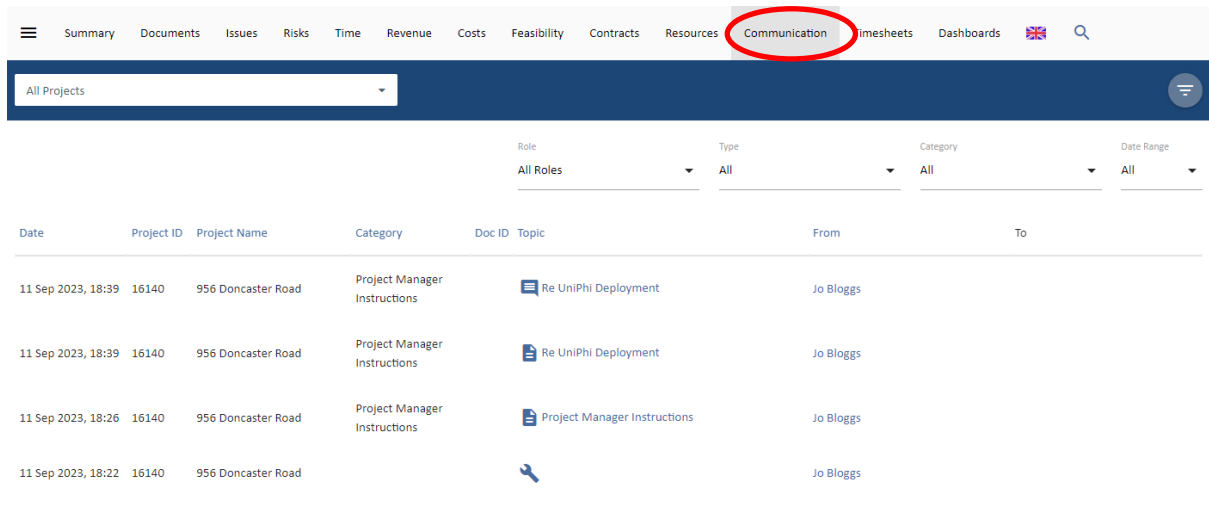
The screenshot shows the UniPhi interface with the 'CORRESPONDENCE' tab selected. The main content area displays the following table:

Correspondence: Optimum Construction Pty Ltd									
Type: All Category: All Date Range: All									
Date	Project ID	Project Name	Category	Doc ID	Topic	Paid	From	To	
11 Sep 2023, 17:56	16140	956 Doncaster Road	RFI - Contractor		Clash between air conditioning channels and lift well		Jo Bloggs	Annie Lennox	
11 Sep 2023, 17:03	100062	300 Melville Road Apartments	Quality		Scaffolding		Jo Bloggs	Annie Lennox, Clint Martin...	
11 Sep 2023, 16:59	100062	300 Melville Road Apartments	Quality		Scaffolding		Jo Bloggs	Annie Lennox, Clint Martin...	
11 Sep 2023, 15:08	100062	300 Melville Road Apartments	Quality		Scaffolding		Jo Bloggs	Annie Lennox, Clint Martin...	

Figure 20 Correspondence view of an Organisation

Communication

The Communication module displays all forms of interaction that have occurred across your entire portfolio. It's a very broad, comprehensive, and powerful view of information and can be seen as a transaction log of all interactions. This interaction encompasses all Issues, actions, comments, emails (sent from UniPhi and using the Outlook Add-In) and documents. Information is displayed regardless of status, due date, or ownership status. This information can be viewed for various purposes, such as Customer Relationship Management (CRM) needs. By applying the correct filters, such as selecting a particular project, it is possible to see exactly what has occurred to date. In effect this means that when you are speaking to someone associated with the particular project/organisation you are viewing, you can see all related issues, and documents, even issues which have been closed.



Date	Project ID	Project Name	Category	Doc ID	Topic	From	To
11 Sep 2023, 18:39	16140	956 Doncaster Road	Project Manager Instructions		Re UniPhi Deployment	Jo Bloggs	
11 Sep 2023, 18:39	16140	956 Doncaster Road	Project Manager Instructions		Re UniPhi Deployment	Jo Bloggs	
11 Sep 2023, 18:26	16140	956 Doncaster Road	Project Manager Instructions		Project Manager Instructions	Jo Bloggs	
11 Sep 2023, 18:22	16140	956 Doncaster Road				Jo Bloggs	

Figure 21 Communications module






Additional Use of filters:

Communications can also be narrowed down using the Role, Type, and Category filters.

Roles: These are the project roles setup in UniPhi prior to implementation. Once resources are allocated to their roles, any form of communication done by them in UniPhi can be viewed using this filter.



Type: This filter allows for the selection of different forms of communication. The range of

communications present in UniPhi are Comments , Emails , Issues  and UniPhi Documents .

Category: The Category filter contains a list of all the document templates and issue categories that have been used. Based on the usage, this filter allows to select and display a specific category of communication.