



UniPhi 19

**Issues Management
Training Manual**



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Course Aim

The aim of this manual is to provide instructions on managing issues and actions. Within this manual you will learn how to create a new issue, set an issue due date, assign an issue owner, escalate an issue, and work with issue categories. You will also learn how to create actions within an issue, set due dates, and assign people to your issue actions. And finally, you will learn how to utilise comments and attachments within an issue to ensure that they are the central transparent location for all attachments, and collaborative communications (comments and emails) related to issue resolution.

How to use this User Training Manual

As you read this manual you will notice the following icons recurring which will help to highlight and enable you to quickly locate activities and summary areas, they will also assist you to understand UniPhi, and avoid any problems.



Puzzle Piece:

The puzzle piece appears at the beginning of each session and any major section to mark the overview of that item's content or concept.



Cogs:

The cogs denote a step by step activity to be completed using UniPhi by the participant relative to the section it is located in.



Light bulb:

The light bulb 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.



Issues Management

Within UniPhi, the Issues module is the centralised point of reference for all activity that is occurring or scheduled to occur within a project. Each issue is logged within the project that it relates to, and is available and viewable by all members of the project team. Project Managers, Program Managers, and Administrators can set due dates, and close issues, while Team Members can create issue, create issue actions, and provide updated comments and attach emails and files. Issues can be created at any time throughout the project, and are in fact the project manager's best friend.



Team Member licence users cannot close an issue, instead they move it to an Awaiting Review status. This ensures that the Project or Program Manager is satisfied that an issue has been resolved and can be closed.

When creating an issue, it is advisable to add as much information as is relevant to the issue, as this will assist the rest of the project team to understand what the issue relates to, and how it needs be resolved.



UniPhi allows only one "owner" to be assigned to an issue, as this ensures accountability. The issue owner may assign tasks within the issue to numerous people, which facilitates collaboration.



Logging a new issue into UniPhi

1. Go to the *Issues* module and search for or select the relevant project the issue relates to from *Project Selection*.

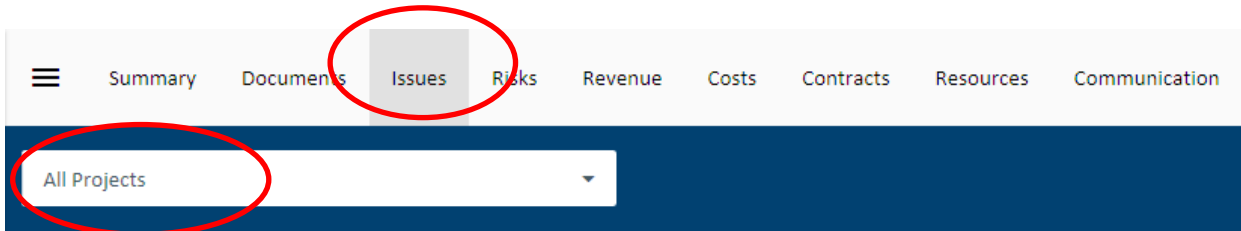



Figure 1 Project search

2. Click . The following issue card will be displayed:

Add New Issue







Issue Description


Category	Assigned To	Escalation Level
None	No Selection	None

Template	Rating	Due Date
None	Med	

Ext Ref	Contractor Reference

Enter your comments

B *I* U ABC |      






  

Figure 2 Add Issue button

3. Enter in as much relevant information as required (description, rating, due date, etc.) and click



to save your issue, or to drill into the issue.



The term Save & Drill is used when you create an issue and need to be taken into the issue that you have just created. You would choose this option if you plan on adding issue actions, and assigning resources to those issue actions. Otherwise, you can simply press save.



Assigning Issue actions

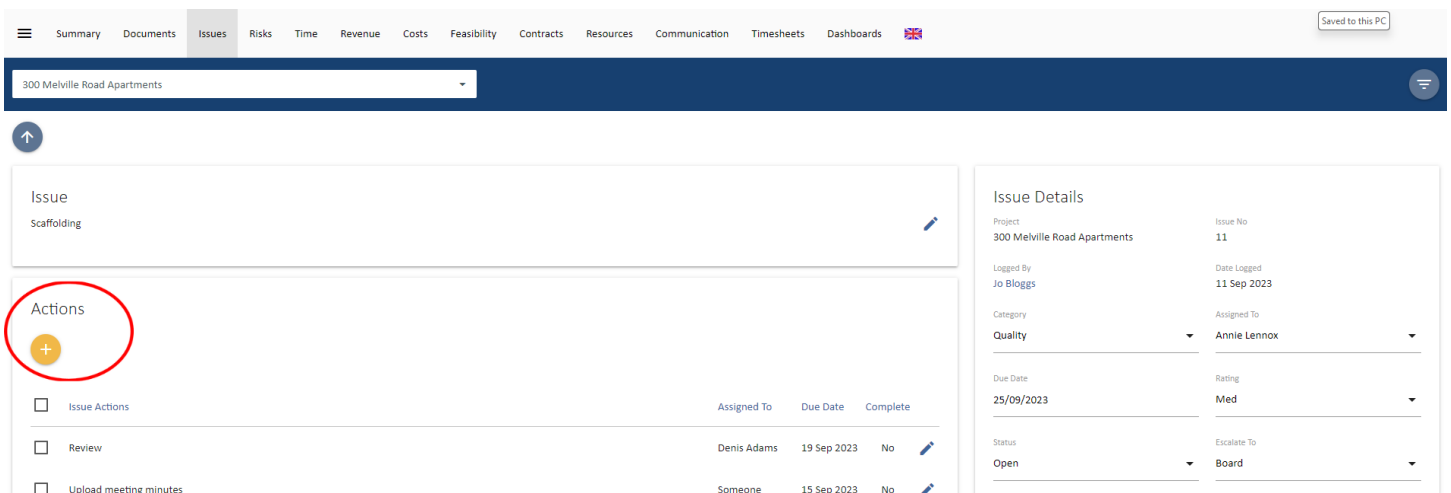
Once an issue has been created you may need to add actions, and assign those actions to people within your project.

1. Click into the issue, and click the button in the



Actions card

Figure 3 Select Add in the Actions card



The screenshot shows the UniPhi software interface. At the top, there is a navigation bar with tabs for Summary, Documents, Issues, Risks, Time, Revenue, Costs, Feasibility, Contracts, Resources, Communication, Timesheets, and Dashboards. Below this is a dropdown menu for '300 Melville Road Apartments'. The main content area is divided into two sections. On the left, there is an 'Issue' card for 'Scaffolding' and an 'Actions' card. The 'Actions' card has a red circle around a yellow '+' button. Below the '+' button is a table with columns for 'Issue Actions', 'Assigned To', 'Due Date', and 'Complete'. The table contains three rows: 'Issue Actions', 'Review', and 'Upload meeting minutes'. On the right, there is an 'Issue Details' card with fields for Project, Issue No, Logged By, Date Logged, Category, Assigned To, Due Date, Rating, Status, and Escalate To.

2. Enter in a description for your action, assign it to a person who will complete the action, and assign a due date (if relevant). Then press



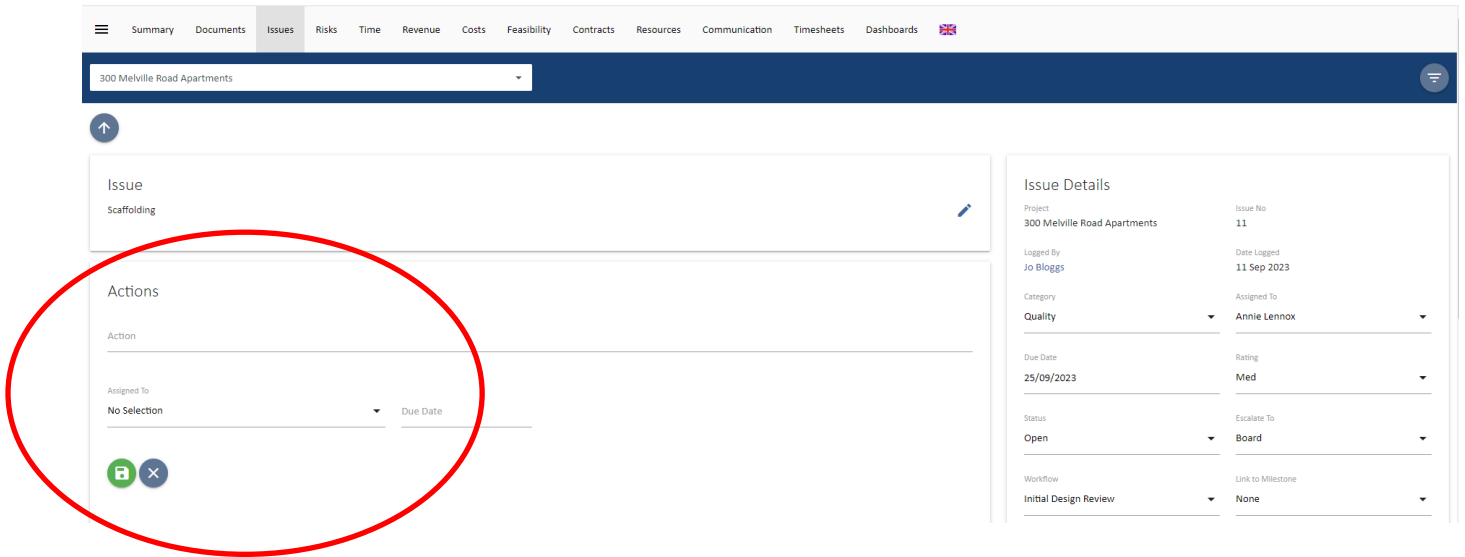


Figure 4 Adding an Action to an Issue

3. Continue creating subsequent actions until all required actions have been established.



When adding a due date to an action that is later than the overall due date of the issue, the overall due date will be extended to match the latest action due date. This can be useful for team members who cannot change an overall due date but can create an issue action which effectively changes the overall due date.



Attachments and Comments within an Issue

As UniPhi uses Issues as the central location for collaborating on the progress of project activities, it is important to understand how to add comments and any attach related files.

1. Go into an issue, and press the  button on the comments panel.

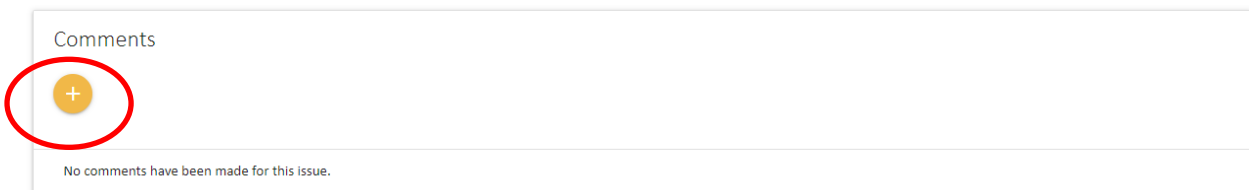


Figure 5 Adding a Comment to an Issue

2. Enter comments that relate to your issue.



It can be useful to include a hyperlink to a website within your comments. This is done by highlighting some text, pressing the right mouse button, and selecting the Insert/Edit Link option. Then simply paste your URL and press save.

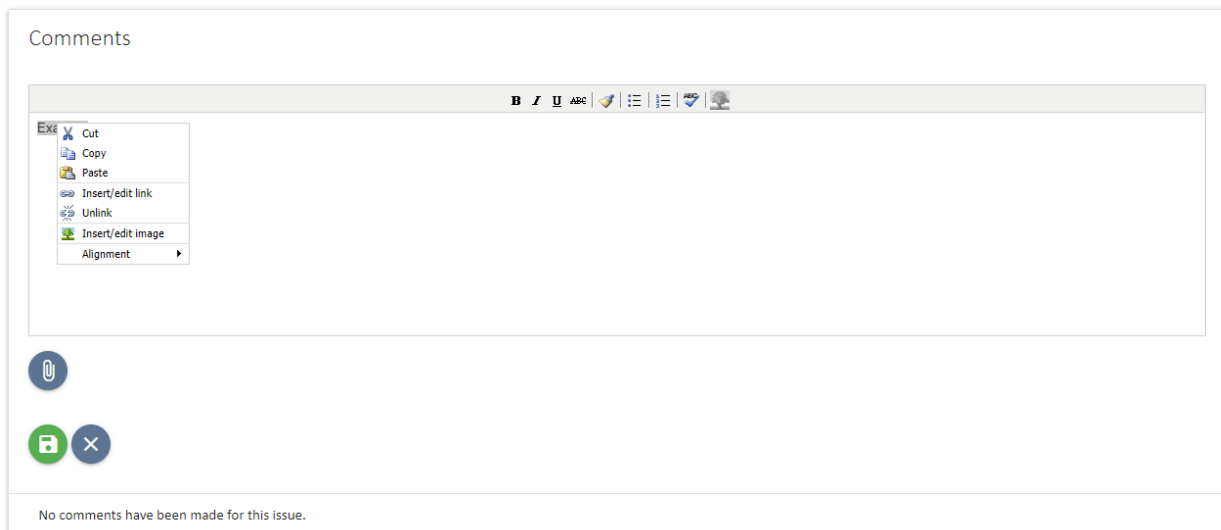


Figure 6 create a link within the Comments card of an Issue

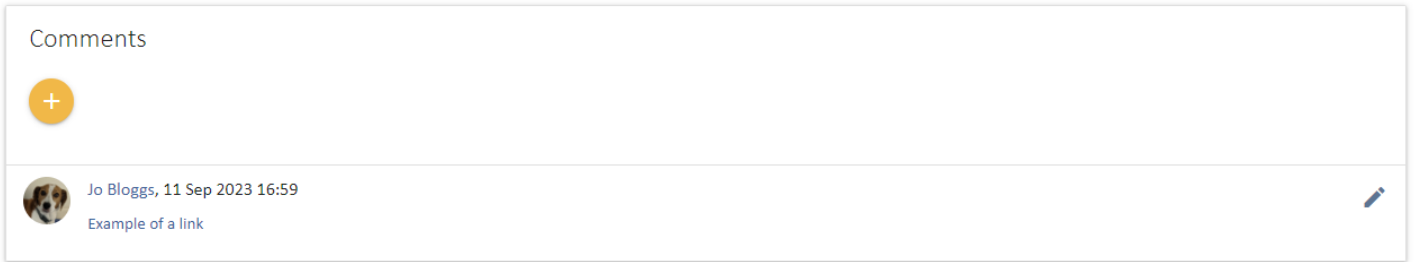




Figure 7 Links appear with blue text

3. When attaching files, press the  button in the Comments card, then the  button and select your files.

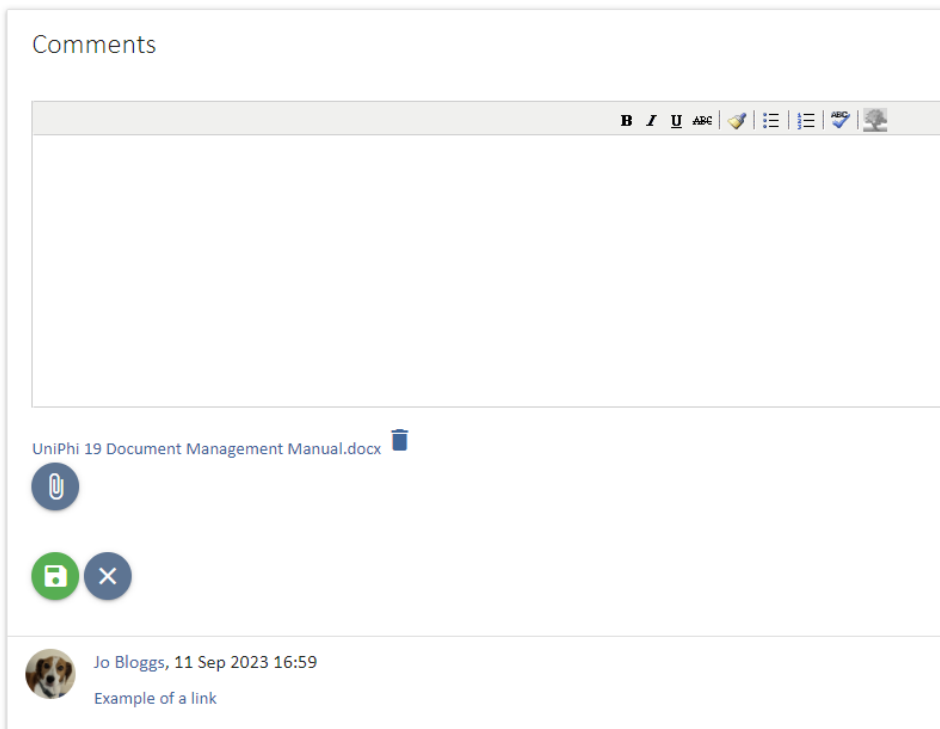


Figure 8 Attach relevant files

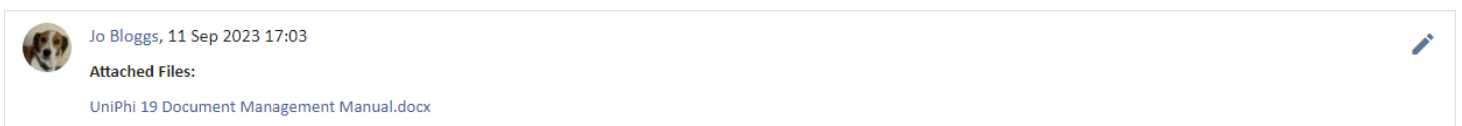


Figure 9 Saved attachments as they appear within comments



Once a comment has been saved into an issue it cannot be deleted. You can edit your own comments and remove text, but the comment will still be there. It is not possible to alter or amend the comments made by any other user.

Issues can have linked UniPhi documents associated with them, files can also be attached within issue comments. UniPhi stores these items in convenient panels within each issue. In the screenshot below, you will see a linked document in the Related Documents panel, and related files in the File Attachments panel. The file attachments panel is very useful for identifying file attachments chronologically, particularly when there is a long commentary.

Related Documents		
Document	Last Modified	Sent
Engineering Drawings	14 Jun 2018, 12:20 By Jo Bloggs	No

File Attachments	
File	Date
UniPhi 19 Document Management Manual.docx	11 Sep 2023

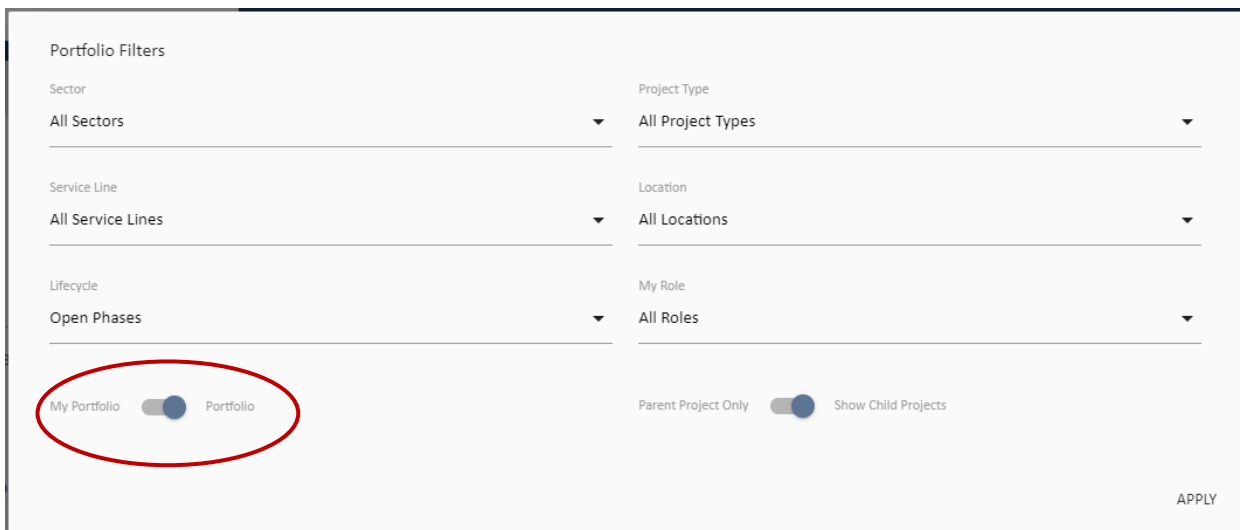
Figure 10 Instantly find related files and documents

Viewing Issues

Project correspondence will come from a variety of sources; meetings, phone conversations, emails, normal hardcopy mail, and issue comments made by the project team. All of these conversations, when requiring more than a token effort to deal with, should be logged in UniPhi so they can be tracked, delegated, prioritised and resolved effectively.

The My Portfolio view is displayed below and you will see that the “assigned to” list has a variety of people who have been allocated responsibility for resolving an issue.

Figure 11 My Portfolio/Issues Displays all issues across each of the projects that you are involved in



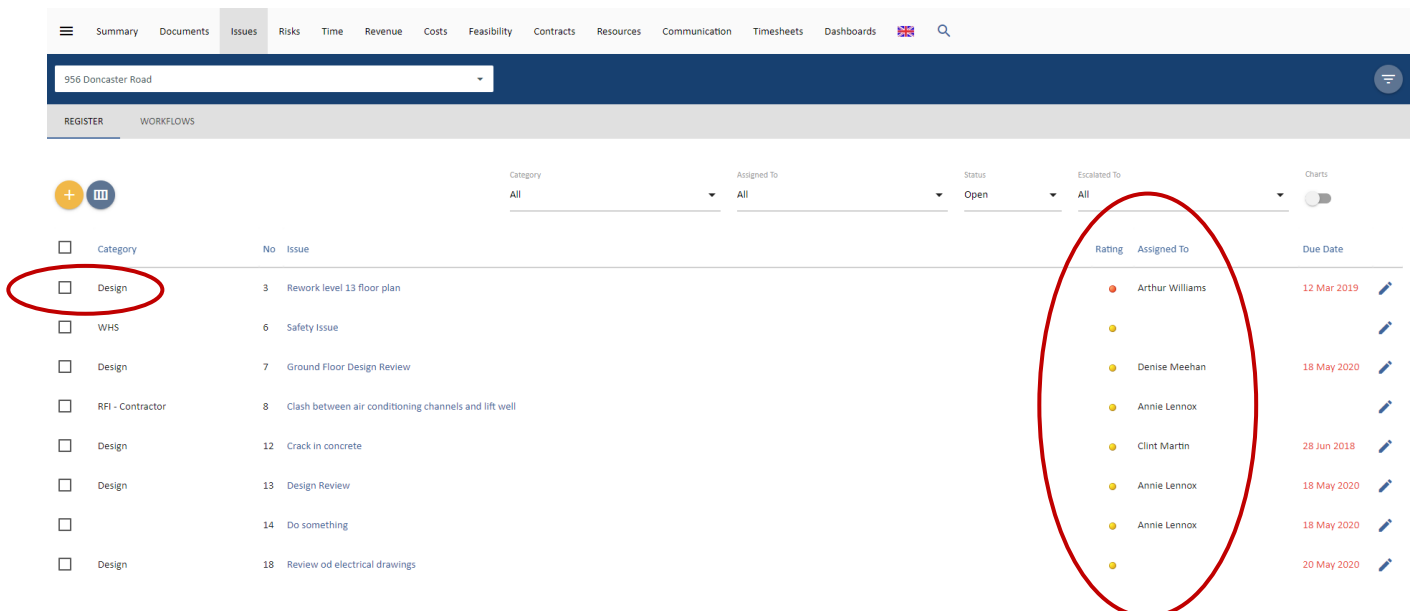
The screenshot shows the 'Portfolio Filters' section with the following settings:

- Sector: All Sectors
- Project Type: All Project Types
- Service Line: All Service Lines
- Location: All Locations
- Lifecycle: Open Phases
- My Role: All Roles
- Parent Project Only:
- Show Child Projects:

The 'My Portfolio' radio button is circled in red. An 'APPLY' button is located at the bottom right.



UniPhi sorts all issues according to their priority (High, Medium, and Low). Within each priority level, the most recently added issue is placed at the bottom of the priority list. E.G, a new Medium rated issue will appear at the bottom of the list of medium issues, and directly above the first Low rated issue



The screenshot shows the 'Issues' tab in UniPhi. The filters are set to: Category: All, Assigned To: All, Status: Open, Escalated To: All. The 'Design' category is circled in red. The 'Assigned To' column is also circled in red, showing a list of names: Arthur Williams, Denise Meehan, Annie Lennox, Clint Martin, Annie Lennox, and Annie Lennox.

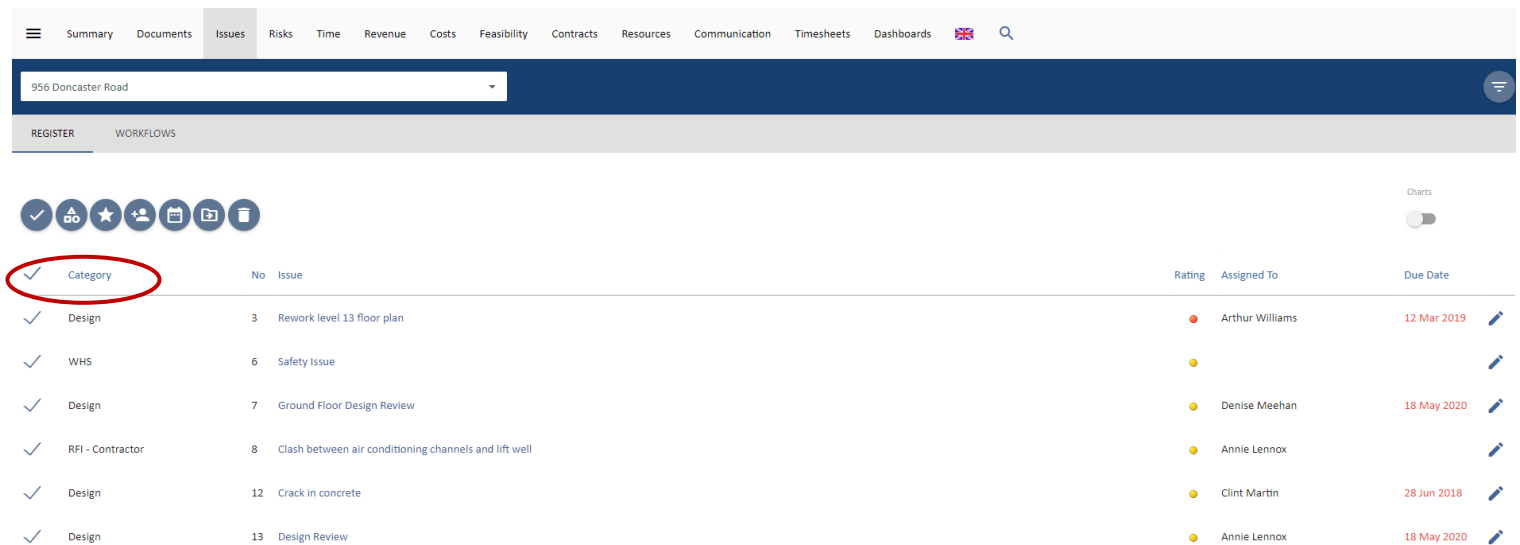
Category	No	Issue	Rating	Assigned To	Due Date
<input checked="" type="checkbox"/> Design	3	Rework level 13 Floor plan	High	Arthur Williams	12 Mar 2019
<input type="checkbox"/> WHS	6	Safety Issue	Medium		
<input type="checkbox"/> Design	7	Ground Floor Design Review	Medium	Denise Meehan	18 May 2020
<input type="checkbox"/> RFI - Contractor	8	Clash between air conditioning channels and lift well	Medium	Annie Lennox	
<input type="checkbox"/> Design	12	Crack in concrete	Medium	Clint Martin	28 Jun 2018
<input type="checkbox"/> Design	13	Design Review	Medium	Annie Lennox	18 May 2020
<input type="checkbox"/>	14	Do something	Medium	Annie Lennox	18 May 2020
<input type="checkbox"/> Design	18	Review od electrical drawings	Low		20 May 2020

Email Summary Notifications

Each stakeholder associated with an issue will remain updated on the status of the issue. Stakeholders are classified as anyone who is involved in the issue (assigned an action, left a comment, created the issue, etc). UniPhi can be configured to provide regularly scheduled email updates to all stakeholders when changes are made to an issue. Issue changes that trigger an email update can include the addition of comments, actions, re-assignments and/or changes to due dates.



Issues can be updated in bulk from the Issue module. The checkbox next to each issue needs to be selected before the changes can be applied. When the checkbox is selected, additional options appear. The changes that can be made in bulk are, changing an issue due date, rating, or assignment. It's also possible to move an issue (or multiple issues) into a different project.



The screenshot shows the UniPhi interface with a navigation bar at the top containing 'Summary', 'Documents', 'Issues', 'Risks', 'Time', 'Revenue', 'Costs', 'Feasibility', 'Contracts', 'Resources', 'Communication', 'Timesheets', and 'Dashboards'. Below the navigation bar is a search bar with '956 Doncaster Road' and a 'REGISTER' button. A toolbar with various icons is visible above the table. The table has columns for 'Category', 'No', 'Issue', 'Rating', 'Assigned To', and 'Due Date'. The 'Category' column has checkboxes next to each row, with the first one circled in red.

Category	No	Issue	Rating	Assigned To	Due Date
<input checked="" type="checkbox"/> Design	3	Rework level 13 floor plan	●	Arthur Williams	12 Mar 2019
<input checked="" type="checkbox"/> WHS	6	Safety Issue	●		
<input checked="" type="checkbox"/> Design	7	Ground Floor Design Review	●	Denise Meehan	18 May 2020
<input checked="" type="checkbox"/> RFI - Contractor	8	Clash between air conditioning channels and lift well	●	Annie Lennox	
<input checked="" type="checkbox"/> Design	12	Crack in concrete	●	Clint Martin	28 Jun 2018
<input checked="" type="checkbox"/> Design	13	Design Review	●	Annie Lennox	18 May 2020

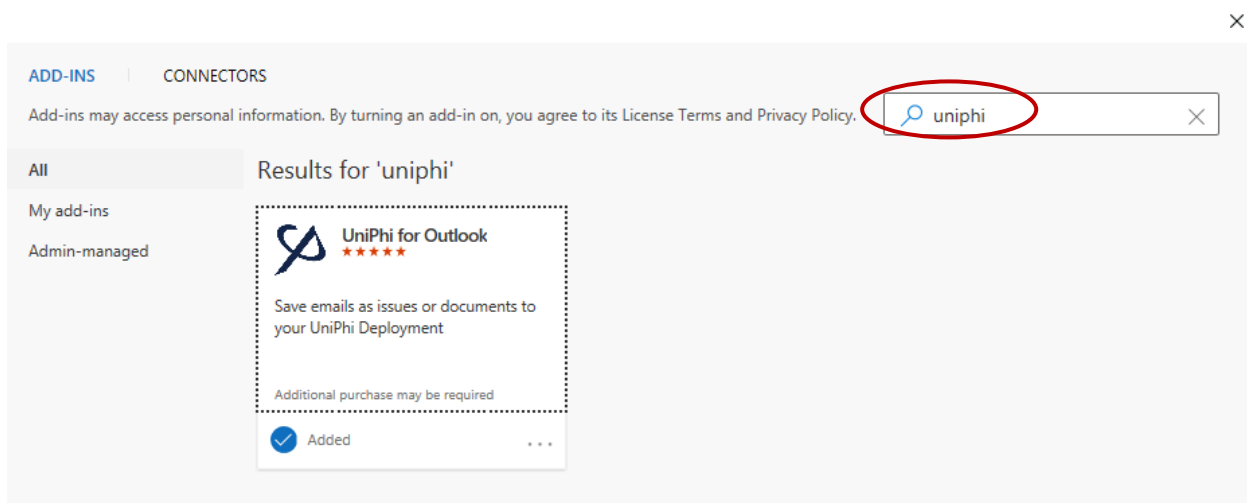
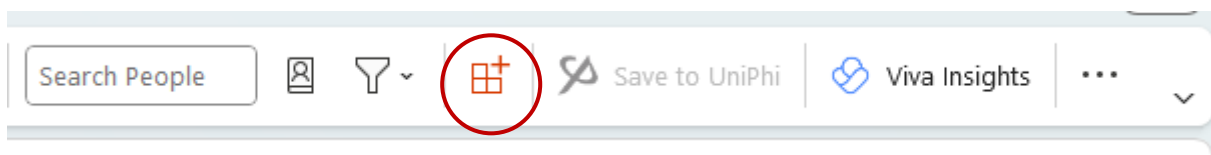
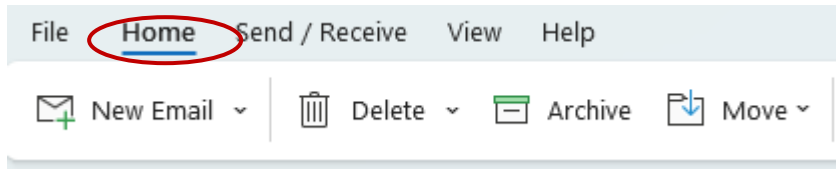
Figure 12 Select Issues to update them in bulk

Saving emails into UniPhi

Project related communications from external parties often come via email. It is useful to save them into a UniPhi issue via the UniPhi for Outlook Add-in. Saving emails into UniPhi issues aids with collaboration and provides additional transparency to each issue. The entire project team can see all saved emails, and their file attachments. The UniPhi for Outlook Add-in can be used to either create a new issue, append an existing issue, or create new or append an existing document.



(The plug-in is available as an Outlook add -in, please follow the download instructions below)



Save an email into UniPhi Issues

1. Once relevant email communication has been received via MS Outlook, select the email and click on the “Save to UniPhi” button, which is located in the Outlook menu ribbon.

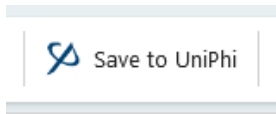


Figure 13 UniPhi for Outlook Add-in button

2. This will launch the Add-in form and ask you to login:

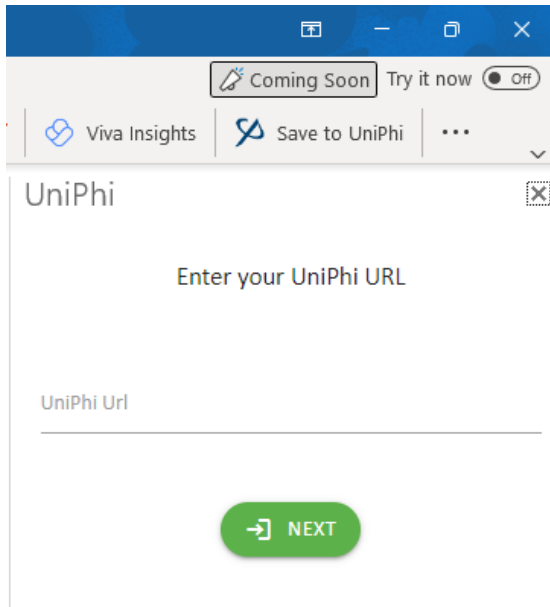




Figure 14 UniPhi for Outlook Add-in Login

3. Then select to save the email as either a new issue  or append it to an existing issue 

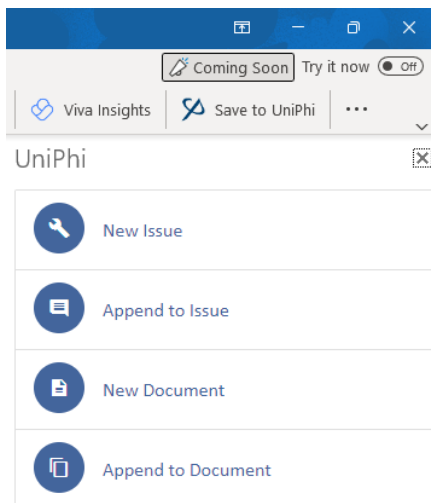



Figure 15 UniPhi for Outlook Add-in options

4. If you select **New Issue**  **New Issue**, the Create New Issue form will appear. The email title will auto-populate as the Issue Description. Select the project from the drop-down menu. Select any of the other relevant fields.

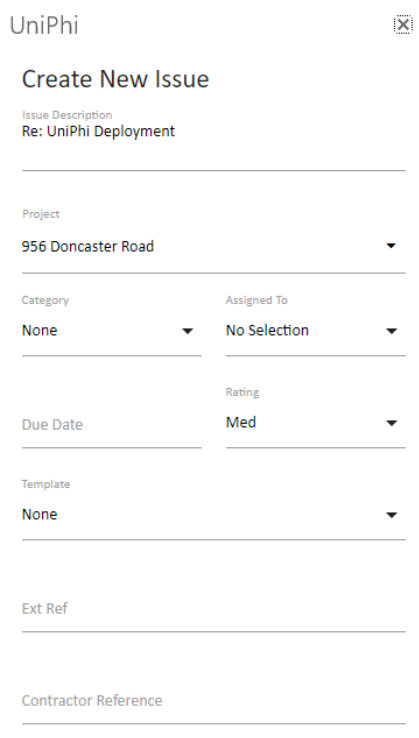


Figure 16 UniPhi for Outlook Add-in Create New Issue form

5. If the email has attachments, these will be listed at the bottom of the form as an option to save into the issue. Check the box next to the attachments you want to save.

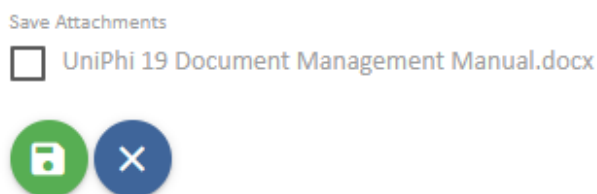

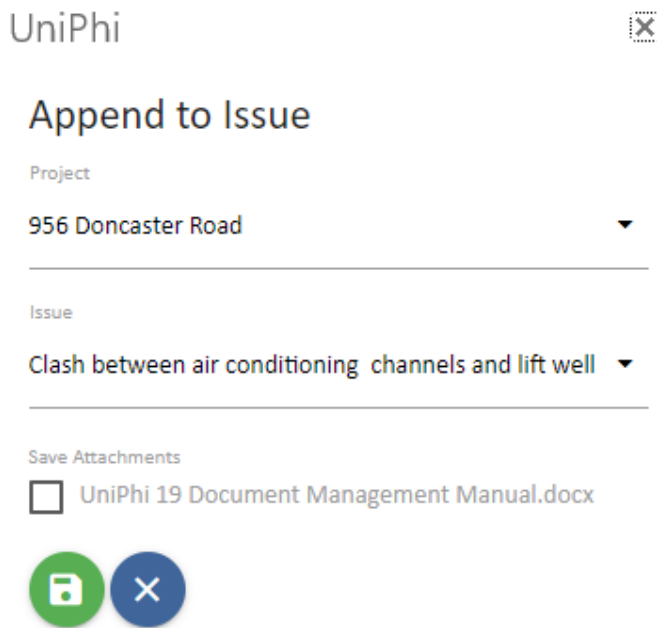



Figure 17 UniPhi for Outlook Add-in Create New Issue form - attachments

6. If you select Append to Issue  Append to Issue the Append to Issue form will appear. Select the project and the issue you want to save the email to. The Save Attachments option will also appear if relevant.



The screenshot shows the UniPhi interface for the 'Append to Issue' form. At the top left is the UniPhi logo and a close button (X in a square). The main title is 'Append to Issue'. Below it, there are two dropdown menus: 'Project' with the value '956 Doncaster Road' and 'Issue' with the value 'Clash between air conditioning channels and lift well'. Underneath is a 'Save Attachments' section with a checkbox and the text 'UniPhi 19 Document Management Manual.docx'. At the bottom are two circular buttons: a green one with a document icon and a blue one with an 'X' icon.

Figure 18 UniPhi for Outlook Add-in Append to Issue form

7. Select Save  to complete the process. The email will now be linked to UniPhi, and the UniPhi for Outlook Add-in will show the link. If you press the link, UniPhi will open the issue in your browser.

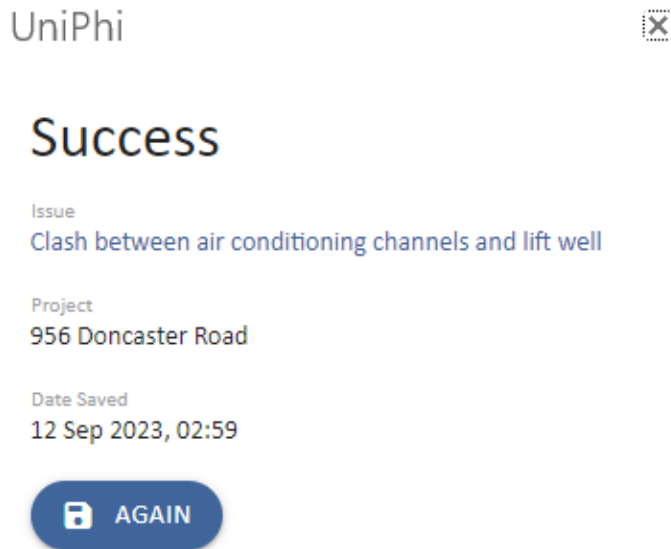



Figure 19 UniPhi for Outlook Add-in shows the link to the saved email

Once the email has been saved, you (and your project team) can also locate it via the Issues tab. Here you will be able to view the original email and any attachments, add comments / instructions to aid communication and workflows surrounding the issue, and add actions required to close out the issue.

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

956 Doncaster Road

Issue
Clash between air conditioning channels and lift well

Issue Details
Project: 956 Doncaster Road Issue No: 8
Logged By: Jo Bloggs Date Logged: 29 May 2018
Category: RFI - Contractor Assigned To: Annie Lennox
Due Date: Rating: Med
Status: Open Escalate To: None
Workflow: None Link to Milestone: None
Ext. Ref: Contractor Reference

Actions
No actions have been logged for this issue

Comments
Jo Bloggs, 11 Sep 2023 17:56
From: Andrei Pavel
Sent: Tuesday, Sep 12, 2023 02:51 AM
To: Andrei Pavel
Subject: Re: UniPhi Deployment
Dear [Recipient's Name],
I hope this email finds you well. I am writing to inquire about UniPhi software deployment and would greatly appreciate it if you could provide me with more information on this topic.
As our organization is actively exploring solutions to enhance project management and streamline our workflows, we have heard positive feedback about UniPhi's software suite. We are particularly interested in understanding the deployment process, as a successful implementation is crucial for achieving our goals.

Related Documents

Document	Last Modified	Sent

Figure 20 UniPhi Issues module showing an email saved using the UniPhi for Outlook Add-in

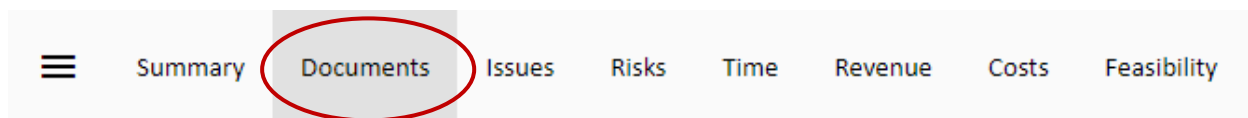


Link an issue to a document

The UniPhi Documents module can create a document that is linked to an issue so that all communications can be seen in the one screen. Note the attached file in the comments thread and the response document (in this example a Site Inspection Report) in the *Related Documents* box.

To link a document to an issue:

1. After having received and / or created an issue in UniPhi that requires a linked document (e.g. a response document), go to the *Documents* module (ensuring you are drilled in to the relevant project).



2. Click  to start the *Create Document* wizard (this will open in a new tab or window):

Create New Document

Category Use Template

All Select Template

Figure 21 UniPhi Create New Document wizard

3. Select a Template that has been designed to capture a specific issue (e.g. Project Managers Instructions) and Name the document. Click the green arrow to create the document.

Create New Document

Category: **All** Use Template: **Project Manager Instructions**

Create In Project: **956 Doncaster Road**

New Document Name: **Project Manager Instructions**

➔

Figure 22 UniPhi Create New Document wizard – Project Manager Instruction template selected

Select the Issue that your document relates to at the related issues step

Document Template: Project Manager Instructions

Issue Selector

Select which issue this document relates to. If there are no related issues, you can hide the output.

Category: **All** Escalated To: **All** Select Existing Issue: **None**

Include Actions: ⓘ

+ ISSUE

Selected Issues: 📄

➔

Start

1. PQP Template 🔍
2. Contract Details 🔍
3. PMI Reference Number 🔍
4. Project Manager Instructions 🔍
5. Distribution 🔍
6. Issue Selector 🔍 ←
7. Instructions 🔍
8. Related documents 🔍
9. Related unstructured documents 🔍
10. Risk Summary 🔍
11. Risk Details 🔍
- Finish

Figure 23 Issue Selector Document step

4. When you have finished creating your document, you will find that you have a circular reference between the document and the issue that it is linked to.

Issue Selector

Concrete foundations need to be re-poured.

Figure 24 Excerpt from a document with a linked issue

Related Documents		
Document	Last Modified	Sent
Project Manager Instructions	11 Sep 2023, 18:26 By Jo Bloggs	No
Architect Instructions	29 May 2018, 11:41 By Jo Bloggs	No

Figure 25 Link back to document in the issue



Save an email into UniPhi Documents

1. An email can also be saved into a document using the UniPhi for Outlook Add-in. Select the email and click on the “Save to UniPhi” button, which is located in the Outlook menu ribbon.

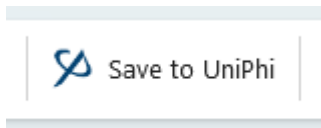


Figure 26 UniPhi for Outlook Add-in button

2. If you have not already logged in to UniPhi in Outlook, this will launch the Add-in form and ask you to login:

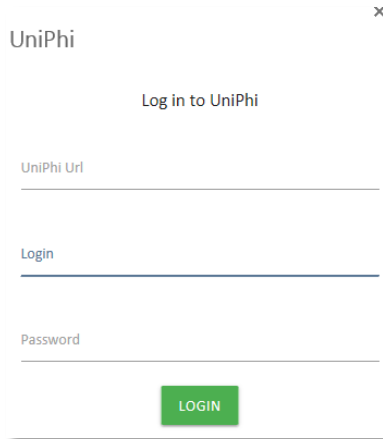




Figure 27 UniPhi for Outlook Add-in Login

- Then select to save the email as either a new document  **New Document** or append it to an existing document  **Append to Document**

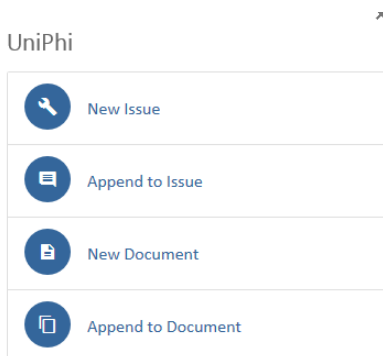




Figure 28 UniPhi for Outlook Add-in options

- If you select New Document  **New Document** the Create New Document form will appear. The email title will be auto-populated as the Document Name. Select the Project and then use the Category and Template selector to select the UniPhi Document Template you wish to save the email into. Attachments can also be selected. Set the status you want for the document and select Save  .



Create New Document

Document Name

Re UniPhi Deployment

Project

956 Doncaster Road



Category

All



Template

Project Manager Instructions



Status

Draft



Save Attachments





 UniPhi 19 Document Management Manual.docx



Figure 29 UniPhi for Outlook Add-in Create New Document form


5. If you select Append to Document  Append to Document, the Append to Document form will appear. Select the project, category (optional) and template to be given a list of documents to choose to save the email to. Attachments can also be selected. Set the status you want for the

document and select Save  .


UniPhi 

Append To Document


Project

956 Doncaster Road 


Category

All 


Template

Project Manager Instructions 


Document

Project Manager Instructions 

Status

Draft 

Save Attachments

 UniPhi 19 Document Management Manual.docx



 

Figure 30 UniPhi for Outlook Add-in Append to Document form

6. When you save, UniPhi for Outlook will show you the details of the document and provide a link to it.

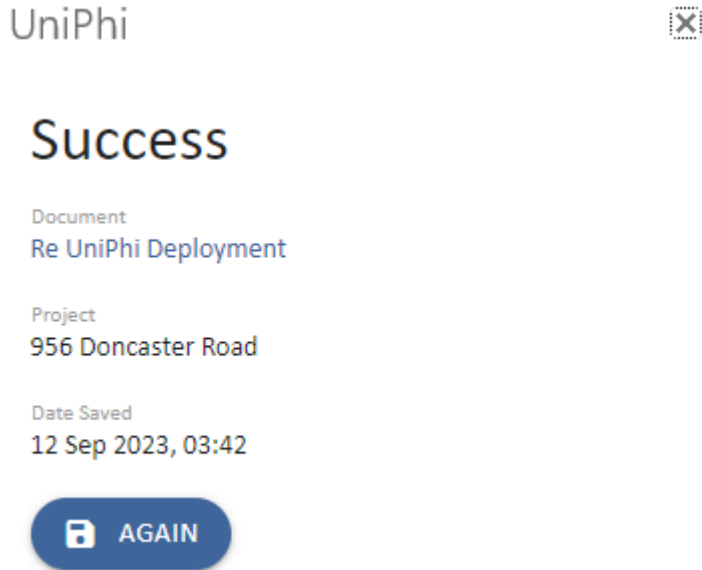



Figure 31 UniPhi for Outlook Add-in shows the link to the saved document

7. Press the link and the document will open in UniPhi. You will see that the contents of your email now appear within the document you have either created or amended.

View Version
1



Document Name
Re UniPhi Deployment

Document Template
Project Manager Instructions

Project
956 Doncaster Road

<small>Created By</small>	<small>Document Status</small>	<small>Last Modified</small>	<small>Version</small>
Jo Bloggs	Draft	11 Sep 2023, 18:39	1

Project Manager Instructions

\$project.name **Project ID: \$project.id**

PMI Number: \$document.AutoNumber **Date Issued:** \$date.today

Principal: \$Contract.PrincipalName **Contractor:** \$Contract.SupplierName

Organisation: \$Contract.PrincipalOrganisation **Organisation:** \$Contract.SupplierOrganisation

Superintendent: \$Resource('Superintendent').Name

Original Contract Value \$Contract.OriginalValue

Distribution

Instructions

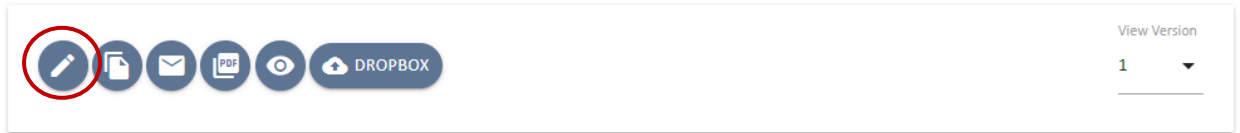
Related documents

No document selected.

New Attachments	Description
Re UniPhi Deployment.eml	

Figure 32 Document created with the UniPhi for Outlook Add-in

8. You may wish to continue working on the document that you have saved your email into. In this case you will need to press the edit button to take you into the document edit mode.



Document Name
Re UniPhi Deployment

Document Template
Project Manager Instructions

Project
956 Doncaster Road

Created By
Jo Bloggs

Document Status
Draft

Last Modified
11 Sep 2023, 18:39

Version
1

Figure 33 Selecting the Edit button in a document

- Once you are in edit mode, each of the template steps will appear, thus allowing you to create and update the necessary contents.

Document Template: Re UniPhi Deployment

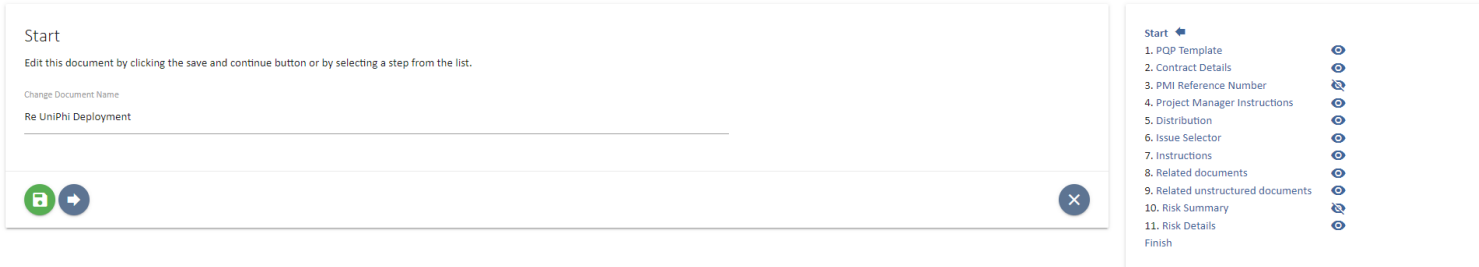


Figure 34 Editing a Document created with the UniPhi for Outlook Add-in



Issue Escalation

Issues can be rated according to a High, Medium, or Low priority. Issues can also be assigned to a specific category. By setting priority levels and by applying issue categories, it is quite easy to focus on a particular set of issues.

In addition, UniPhi also allows you to escalate issues. Issue escalation is useful where a large number of issues have been logged, and you want/need those issues to be viewed by a particular person, or group of people.

Issue categories and escalation levels are configured by your UniPhi System Administrator.