



**UniPhi 19 System Administrator
Manual**

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One of the unique features of UniPhi is its flexibility, and that that flexibility in configuration is made available to the Administrator(s) with each organisation. This ensures that UniPhi is configured and maintained to suit the specific requirements of your organisation. The UniPhi System Administrator needs a good understanding of both the practical application and the theory associated with managing portfolios, programmes, and projects. It is beneficial for the System Administrator to be familiar with financial concepts, in order to structure UniPhi so as to maximise the value of its finance capabilities. This manual is designed to demonstrate how UniPhi structures information to assist you, the System Administrator, and your organisation to define the way information is classified, and to demonstrate how to configure UniPhi. Further, this manual is designed to assist in understanding the portfolio, programme, and project management methods that UniPhi supports.

How to use this Admin Training Manual

The following icons are used throughout this manual to assist in highlighting and enabling you to quickly locate activities and summary areas, and to avoid potential 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 denotes 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. Details such as dates, budget figures, and other entered text/data will vary.

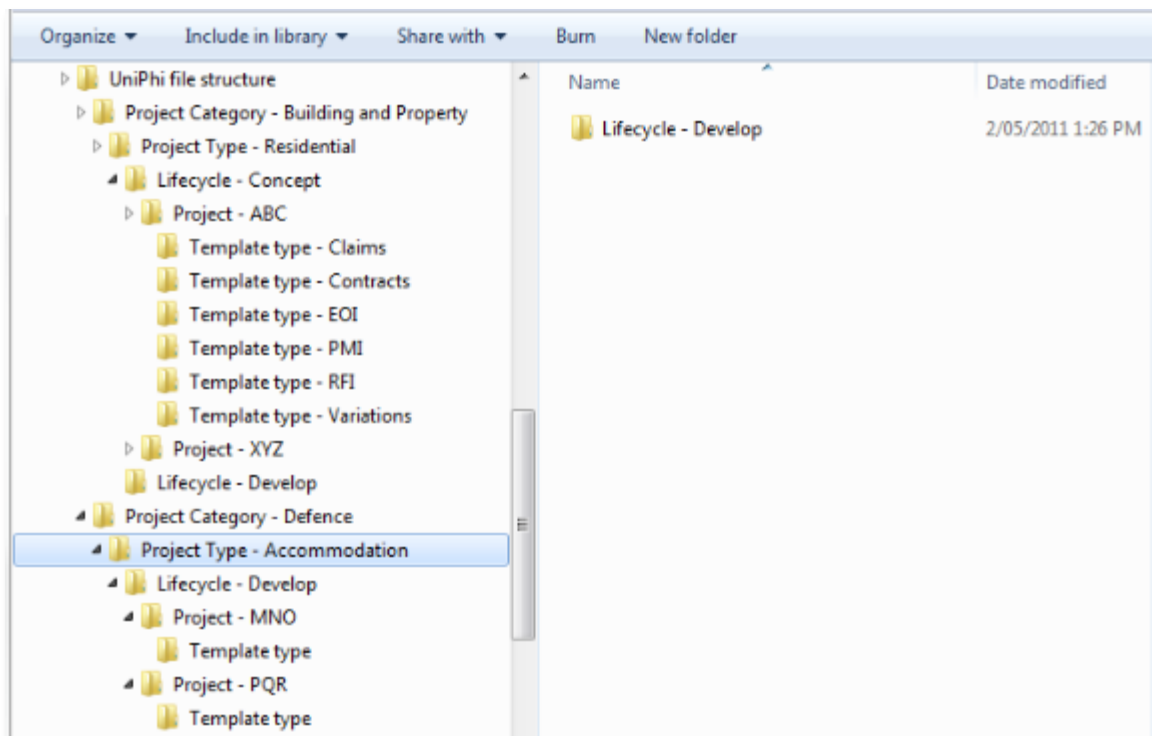


Portfolio Categories and Project Types

UniPhi classifies all projects according to portfolio categories:

- Sectors
- Service lines
- Locations
- Project Types
- Lifecycle

Each of these categories may be defined by your Administrator to match your existing categorisation, or to better manage your project data within UniPhi. In addition, the categories can be configured to only be displayed within certain criteria, so that projects in the Residential sector may display different lifecycle phases than those in Retail (see the section below for a more detailed example). Once categories have been defined, all data henceforth is captured against the project, which already has the portfolio categories associated with it. In essence, these five filters are similar to five layers of a typical network folder structure as per below:



This means that document management in UniPhi is much more efficient than in other document management applications where the portfolio metadata would need to be selected and specified

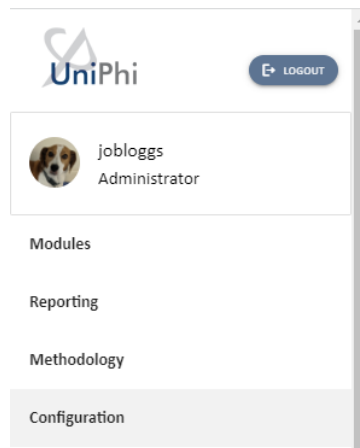
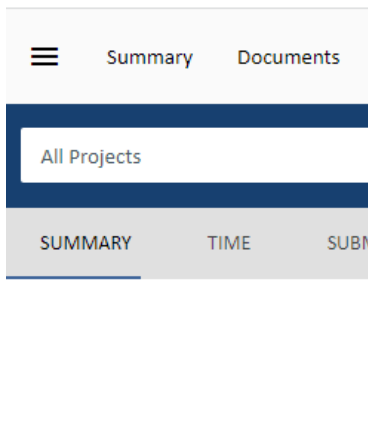


Creating and editing Project Sectors


Project sectors are generally created at the initial set up of UniPhi, though it is possible to create additional, or to edit existing categories, as outlined below:

To create new project sector:


1. Click on the *Side Menu (Hamburger)* > *Configuration* > *Project* tab to see the project sector window:











Issues
Metrics
Prioritisation
Project
Resources
Risks

2. Click on the  icon



Sectors



Code	Sector	
AGC	Aged Care	 
ART	Arts and Recreation	 
COM	Commercial	 
CON	Contract Procurement	 

Sectors


Code	Sector
<input type="text"/>	<input type="text"/>

3. Enter the name of the new project sector

4. Click on the  icon



5. Go to *Summary* view and from the pop out menu . Select the *Sector* drop down list to see your newly created category included in the list.



Portfolio Filters

<p>Sector</p> <p>New Education ▼</p> <hr/> <p>Service Line</p> <p>All Service Lines ▼</p> <hr/> <p>Lifecycle</p> <p>Open Phases ▼</p> <hr/> <p>My Portfolio <input checked="" type="checkbox"/> Portfolio</p>	<p>Project Type</p> <p>All Project Types ▼</p> <hr/> <p>Location</p> <p>All Locations ▼</p> <hr/> <p>My Role</p> <p>All Roles ▼</p> <hr/> <p>Parent Project Only <input checked="" type="checkbox"/> Show Child Projects</p>
--	---



APPLY

You have successfully added a sector



UniPhi has some universal icons that are consistently used throughout the system. Each data grid will have an edit and a delete icon, which is used by the appropriate users to edit that part of the system: edit and delete icons:  

To edit a sector:

1. Click on the  edit icon
2. Edit the name of the project sector
3. Click on the  icon to update all projects that have been assigned to this category.

You have successfully edited a sector

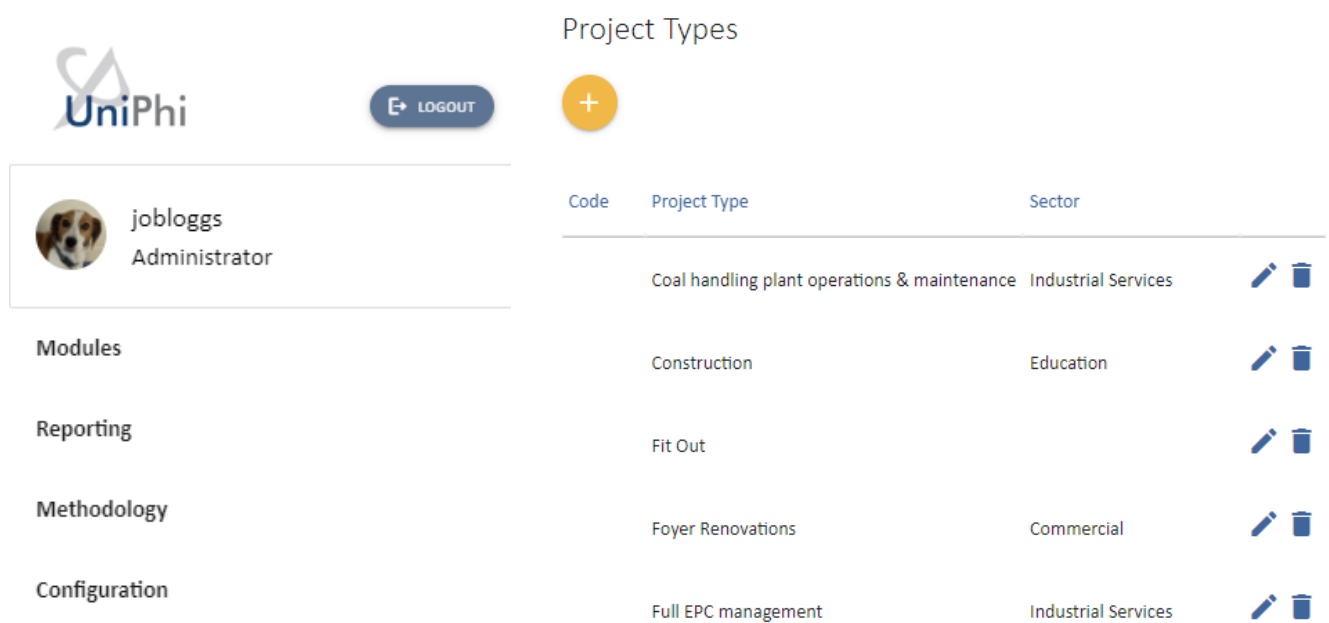












Create and edit Project Types


Project types are typically created upon system deployment, though they can be modified at any time. If you do need to edit or create new project types, simply follow the steps outlined below.

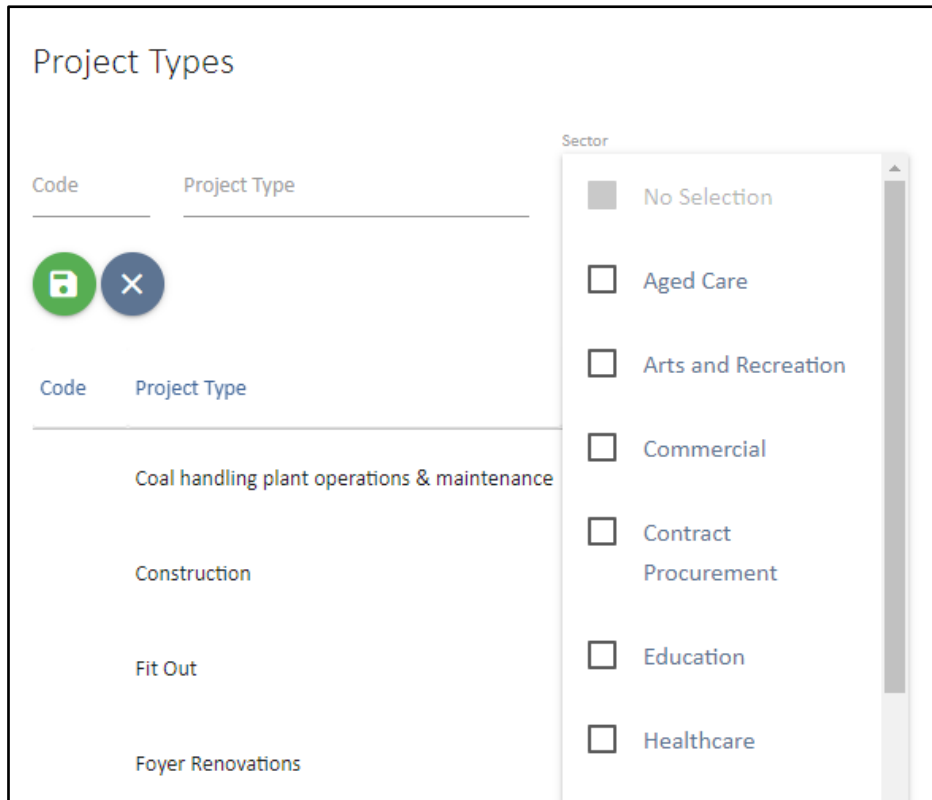
To create a project type:

1. Click on the *Configuration > Project* tabs and navigate to the *Project Types* box:



Code	Project Type	Sector	
	Coal handling plant operations & maintenance	Industrial Services	 
	Construction	Education	 
	Fit Out		 
	Foyer Renovations	Commercial	 
	Full EPC management	Industrial Services	 

2. Click on the  icon
3. Enter the name of the new project type. To restrict that project type to a particular sector, select the sector from the dropdown menu. Project sector and type have a one to one relationship. There only can be one sector linked to one project type.




4. Click on the  icon

You have successfully added a project type

To edit a project type:



5. From the *Configuration > Project, Project Types* page, click on the  edit icon

6. Amend the type




7. Click on the  icon to update all projects that have been assigned this type.

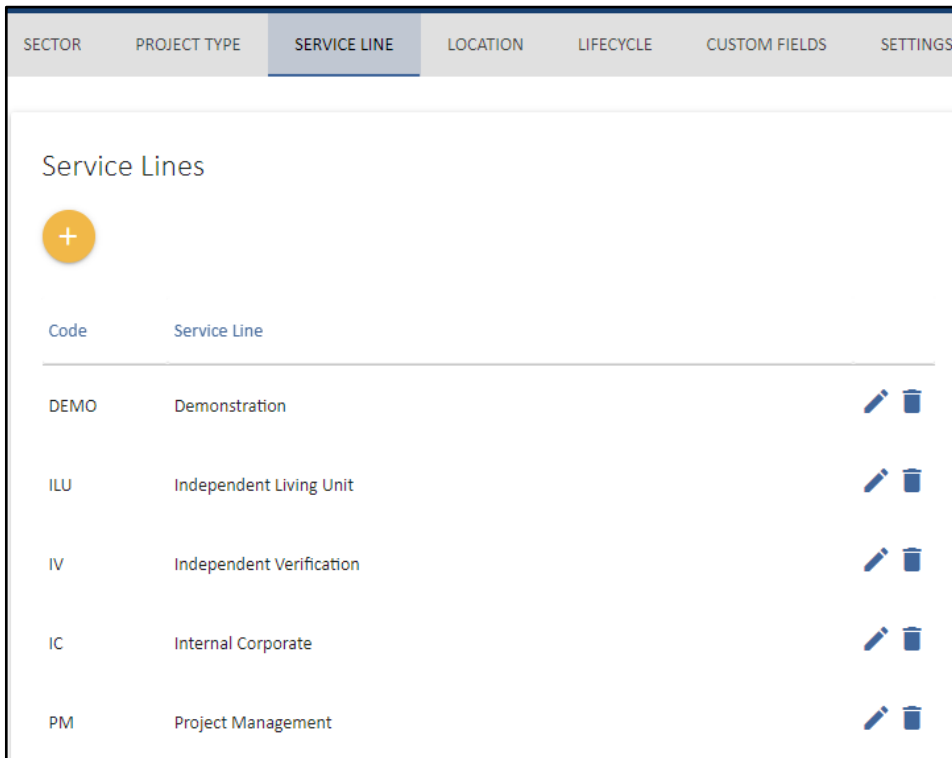
You have successfully amended a project type












Create and edit Service Line

Service lines are another way of filtering for information in UniPhi. The service line filter is generally focused on the various revenue streams of an organisation.

To create a service line

1. Click on *Configuration > Project* tabs and navigate to the *Service Line*. Click 




SECTOR	PROJECT TYPE	SERVICE LINE	LOCATION	LIFECYCLE	CUSTOM FIELDS	SETTINGS
Service Lines						
						
Code	Service Line					
DEMO	Demonstration					
ILU	Independent Living Unit					
IV	Independent Verification					
IC	Internal Corporate					
PM	Project Management					

2. Enter the *Name* and *Code* for a particular service line.

Service Lines



Code Service Line



3. Click on the  icon

You have successfully added a service line.

To edit a service line


4. Click on the  edit icon
5. Amend the name of the service line
6. Click on the  icon to update the service line.

You have successfully amended a service line.

Create and edit Locations/Regions

UniPhi can categorise projects into geographical locations, which allows for analysing portfolio data per specific region, or location. Locations are added as either region and the by location.

To add a region

1. Navigate to *Location* and click the  icon under Region.
2. Enter the name and code of a particular region



Regions

Code	Region Name
 	

3. Click the  icon.


You have successfully created a region.

To edit a region

1. Click on the  edit icon
2. Edit the name of the region, or its code
3. Click on the  icon to update the region

You have successfully edited a region.

To add a location

1. Click on *Configuration > Project > Location* and click the  icon under Location
2. Fill out the *Address Book* details including the *Code* (if applicable)

Location

Code _____ Location Name _____ Region **None** ▼



Phone _____ Fax _____ Email _____

Address 1 _____


Address 2 _____

Suburb _____ State _____ Country _____ Postcode _____

Invoice Disclaimer _____

3. Specify the Region that your location belongs to (if appropriate)

4. Once completed, click the  icon.


You have successfully created a location.



To edit a Location

1. Click on the  edit icon

2. Amend the name of the Location

Location



Code	Region	Location				
<hr/>						
Location Name						
<input type="text" value="15 Bourke St Melbourne Vic 3000"/>						
<hr/>						
Address 1						
<input type="text" value="15 Bourke St"/>		Address 2				
<hr/>		<hr/>				
Suburb						
Code	Region	Melbourne	State	Country	Postcode	 
<hr/>	<hr/>	<hr/>	<hr/>	<hr/>	<hr/>	
Phone			Fax	Email		
<hr/>			<hr/>	<hr/>		
Invoice Disclaimer			<hr/>			

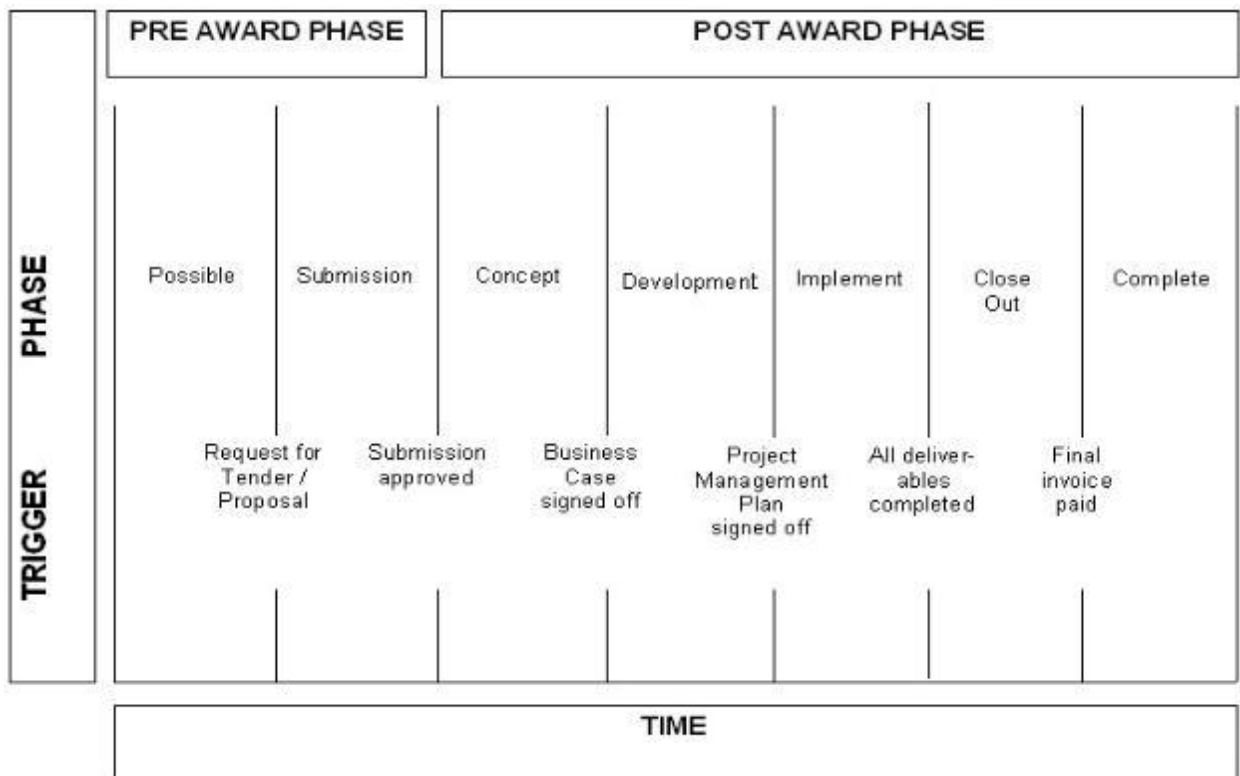
3. Click on the icon to update the location

You have successfully amended a location.



Project Lifecycles and Milestones

Project lifecycle phases are used to track the stage gates of a project as it progresses from one phase to the next. These phases are broken up into Pre Award phases, which are used to track the potential sales pipeline, and Post Award phases, which represent work that has been won and is in progress. Lifecycle phases are defined and configured by an individual company’s methodologies / practices. Below is an example of lifecycle phases showing the triggers for a project’s movement from one phase to the next:



Possible projects that are tenuous, or where the fee and scope of work is unknown, can still be set up in UniPhi for tracking the pipeline of projects. Once it is known that the proposal is likely to proceed, the project is moved to the *Submission* phase.

Submission phase manages the proposal submission. Once the proposal is submitted and a decision has been made, it can be moved either to a post award phase, or cancelled if the proposal was unsuccessful. By cancelling lost work, UniPhi can track win/loss % for submissions and the

value of the won/lost work. Comparing this to invoiced values gives UniPhi the ability to report book to burn ratios.

The post award phases track the projects, or client's stage gates. It may be that your part of the project work is in one of these phases only.

Concept represents the creation of a business case.

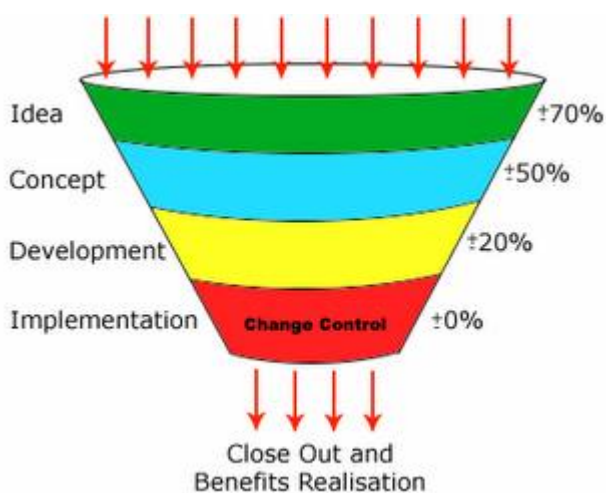
Development is when project planning occurs. The project will move to *Implementation* when the final project management plan has been signed off.

Implementation is where implementation tasks associated with the project occur. The project will move to *Close Out* when all agreed deliverables have been received, and signed off.

Close Out ensures that all post practical completion work has been completed and invoices finalised. The project moves to *Complete* once all invoices have been paid.

Complete is a project that has been completed (typically includes key tasks such as the finalisation of accounts).

Lost/Cancelled is a project that was proposed/tendered and was unsuccessful or that may have been cancelled prior to completion.





Create and Edit the Project Lifecycle

The project lifecycle phases are created by the administrator and is designed to match your existing project management methodology and associated lifecycle of phases. Depending on the size and complexity of your organisation, you may have one or more lifecycle phases that your projects will follow. UniPhi allows the administrator to define the lifecycle phases, and the categories of projects which will align with those phases. You may have a long list of lifecycle phases, but by associating each lifecycle phase to its relevant project category, the phases will be manageable and logical.



The *Phase Number* represents the sequential stages of your phased stage gates.

Pre-Sale Phase is only relevant if you manage projects on behalf of others (e.g. you are a consultant).

Completion State indicates that a projects phase is no longer “visible” within the main portfolio. This allows for completed, cancelled, or on-hold projects to be archived, so as to ensure the focus is on currently active projects.

To create a project lifecycle phase:

1. Click on the *Configuration > Project* tabs and navigate to the *Lifecycle* box:

SECTOR	PROJECT TYPE	SERVICE LINE	LOCATION	LIFECYCLE	CUSTOM FIELDS	SETTINGS	
Lifecycle							
+							
Phase Name	Sector	Project Type	Service Line	Location	Phase Number	Pre-Award	Completion State
Feasibility	Aged Care				1	No	No
Concept					2	No	No
Develop	Residential, Commercial, Retail, Aged Care, Sports Facilities, Education, Infrastructure				3	No	No



2. Click on the icon. The following screen will be displayed:

Lifecycle

<small>Sector</small>	<small>Project Type</small>	<small>Service Line</small>	<small>Location</small>
No Selection ▾	No Selection ▾	No Selection ▾	No Selection ▾

<small>Phase Number</small>	<small>Phase Name</small>	<small>Pre-Award Phase</small>	<small>Completion State</small>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

📁
✕



3. Select the specific *Sector*, *Project Type*, *Service Line* and *Location* of the *Lifecycle* (if necessary)
4. Enter the number that corresponds to the lifecycle phase (e.g. *Concept* would be phase 1, *Submission* would be phase 2 etc.)
5. Enter the name of the *Lifecycle* phase
6. Make sure you include *Pre-Award* and *Completion State* phases. Tick the *Completion State*: tick box for these two phases. This ensures that projects that are completed or cancelled can be archived out of the default view whilst maintaining the information relating to those projects for future reference.



7. Click on the save icon
8. Browse to the *Portfolio* tab and select the *Lifecycle* drop down list from the pop-up menu to see your phase is now included in the list

You have successfully added a lifecycle phase

To edit a lifecycle phase:

1. From the *Lifecycle* page, click on the edit  icon
2. Amend *Lifecycle* changes. For example, you may need to change the name of a lifecycle phase, or change the sequential order that a phase appears within the full lifecycle.
3. Click on the save  icon, to update all projects that have been assigned this phase.

You have successfully amended a lifecycle phase.




Create and Edit the Project Milestones











The project milestones can be applied to a project via two methods. Manually or using a template of predefined milestones. A resource in a role that has a minimum access level of Project Manager is able to manually create milestones from the Milestone menu of a project. However, only a System Administrator can setup Milestones templates. Milestones templates can be categorised as well. In order to set this up:

1. Navigate to Configuration > Time.
2. The first sub-menu allows creation of Milestone categories. Click on ADD & name the category.

MILESTONE CATEGORIES
MILESTONE TEMPLATES

Milestone Categories





Milestone Category	Sector	Project Type	Service Line	Location	
Commissioning					 
Construction					 
Design					 
Implementation					 
Procurement	Contract Procurement			Dublin	 











3. Apply any project filters for this category. The consequence of applying filters to a category impacts the projects that are able to have this category selectable. (eg, if a milestone category is for a particular project type only, then only would you apply that project type to the category).

Milestone Categories


Milestone Category

Sector: No Selection | Project Type: No Selection | Service Line: No Selection | Location: No Selection

Milestone Category	Sector	Project Type	Service Line	Location	
Commissioning					 
Construction					 
Design					 
Implementation					 
Procurement	Contract Procurement			Dublin	 

Once the categories have been created, the Milestone templates can be developed. In order to do this, navigate to the Milestone Template sub-menu.

1. Name the template. The default is “Milestone Template 1”.
2. If you do not have any categories, you can apply project filters to a template so that they only appear to be selected on projects with the same project filters.
3. Enter the milestone order number, the description, and the category (if created) and click the  icon.

No	Milestone	Category	Earned Value (%)	Lock	
1	Business Case approved	None		<input type="checkbox"/>	 Add New Milestone

4. This has create the first milestone in the template. Repeat the process until all milestones have been created for the template.

Earned Value – UniPhi has the ability to track Earned Value on milestone completion. For each milestone, a value (in %) can be entered has having been “earned” on completion. This value can be locked in place is desired.

Project Governance through Roles and Access Levels

Project governance is the method for ensuring a project can resolve issues and remains within its defined delegations of scope and outputs. Typically, governance involves defining the project roles and responsibilities, communication processes, methods, tools and approval requirements.



UniPhi manages project governance through a combination of licence levels and organisation specific roles. There are four licence access levels:

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

Discussion on these three party role levels (i.e. subscription, role and access level) needs to be broken down into read, create, update and delete and into module by module review.

Read access is controlled by the system wide subscription a person has.

Program manager subscription level can read data on every project (excluding private projects) in every module in the system regardless of whether they are on the project or not. Project manager subscription level can read data in every module for projects that they have been allocated to. Team member subscription level can read data in the documents, issues, risks and resources module for projects they have been allocated to.

Create and Update is controlled by the access level of a role on a project.

For all subscription levels other than administrator, you can only create/update information if you are on the project. What you can update on a project depends on what access level the role that you are allocated to on the project is. A role with a program manager access level has full functionality across all modules for that project. A role with a Project manager access level has full functionality across all modules except resources which is configurable at the deployment level to be either full access or read only. A role with team member access can only create documents, issues and risks, update their own documents, issues and risks but not their associated ratings or due dates

Special cases

Documents

Documents have their own party role model configurable by the system administrator. The administrator controls read rights to documents via the setting a templates view rights to an access level on the project (e.g. view only by program managers means you need to be in a role with program manager access level to view documents created from the templates). Create and update is set by selecting admin defined roles to be able to edit documents created from the template. This ignores the access level and focuses purely on the role. Sign off is set by selecting admin defined roles and ignores access level.

Risks

Program Manager Subscription can read all risks across the system and create, update and delete all risks on projects their allocated to a role with program manager or project manager access level. If they are allocated to a role with team member access level then for that project they can only create and update their own risks and cannot change ratings or due dates. Project manager subscription can read, create, update and delete all risks on projects their allocated to a role with program manager or project manager access level. If they are allocated to a role with team member access level then for that project they can only create and update their own risks and cannot change ratings or due dates. Team member subscription can read all risks on projects their allocated to and create and update their own risks. They cannot edit due dates or ratings.

The reports sub nav is configured deployment by deployment at the subscription level e.g. you can have only admin access a reports sub-nav or program manager and above or project manager and above or all.

Team Member Access

People assigned to a Team Member level role on a project can:

- Browse the organisations methodology, as defined by the program office (or System Administrator);
- Create documents (only for 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 via the *My Projects* tab, and
- Search both for methodology content as well as project documentation/artefacts.

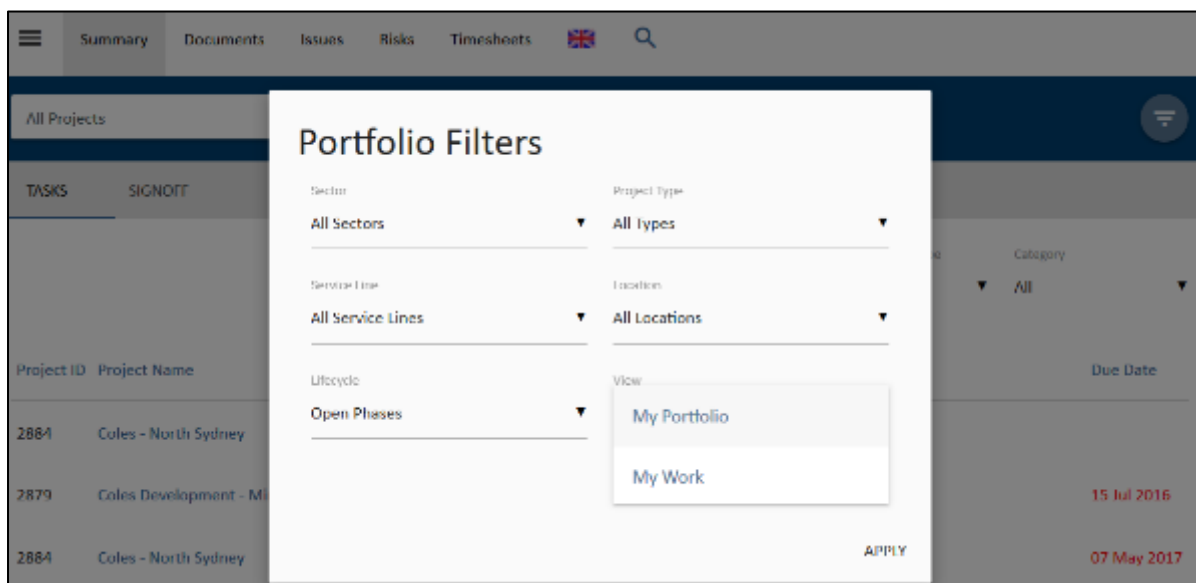
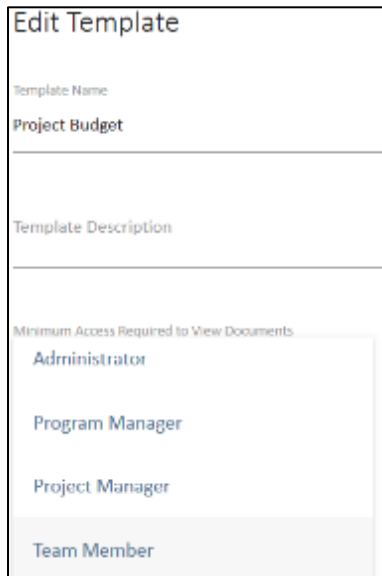


Figure 1. Team Members see these tabs only

Team members cannot view

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



Edit Template

Template Name
Project Budget

Template Description

Minimum Access Required to View Documents

- Administrator
- Program Manager
- Project Manager
- Team Member

Figure 2. Team Member licenced users cannot see this document

Project Manager Access

People assigned to a Project Manager level role on a project have all permissions of the 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 to 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"

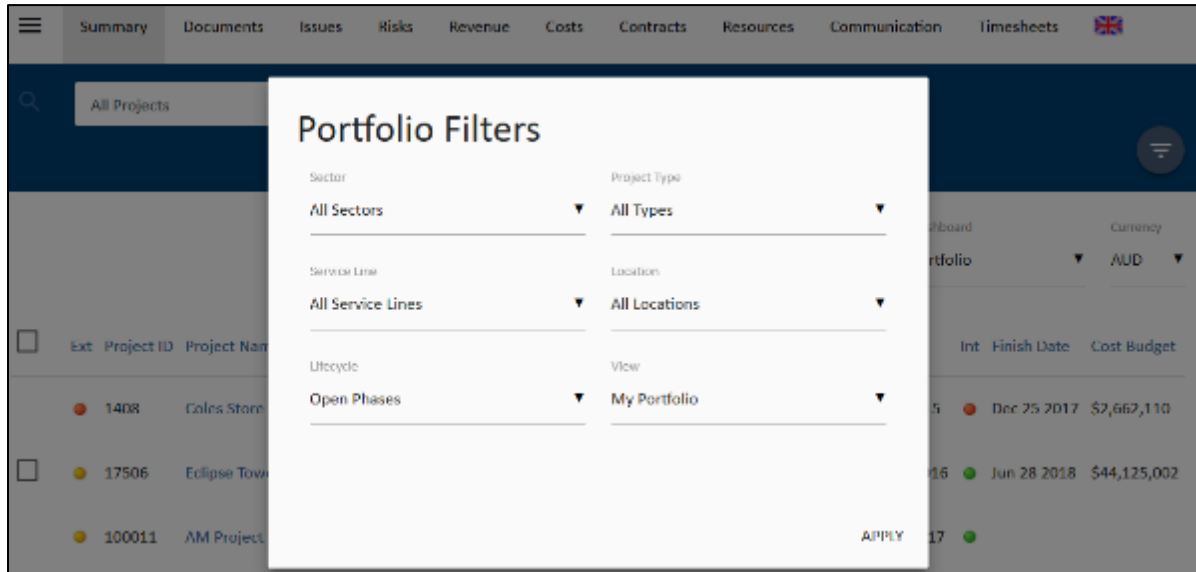


Figure 3 The Project Managers view

Project Manager cannot view

- Projects with 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

Program Manager Access

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.

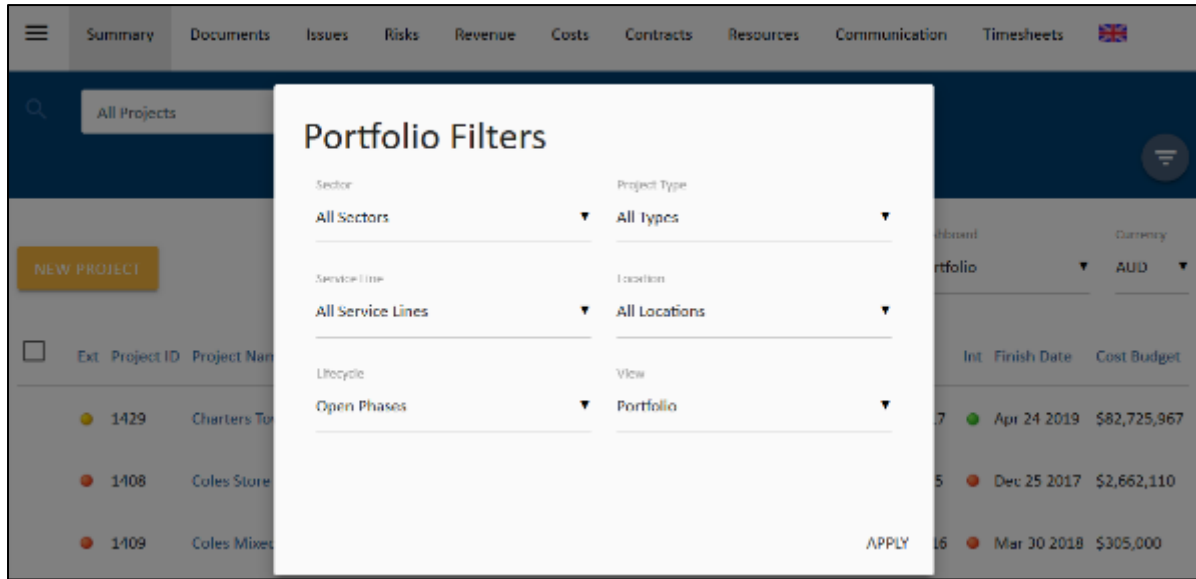


Figure 4 Program Managers view

Program Manager cannot

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



Create Project Roles

A standard set of project roles will be deployed by default however, as organisations become more familiar with the functionality of UniPhi, they will typically create new roles.


To create a project role:

1. Click on the Side menu and select *Configuration > Roles*

Project Roles



Role	Description	Default	Charge Rate	Cost Rate	Mandatory	Use in Details Screen	Access Level	
_Client	Ultimate client for the project scope (an NEC4 role)	No			No	No	Administrator	 
_Employer	Ultimate client for the project works (an NEC3 role)	No			No	No	Administrator	 
Account Manager	Person dedicated as the point of contact for the buyer.	No			No	No	Administrator	 
PMO Manager	Application Owner	No			No	No	Administrator	 



2. Click on the  icon to display the following screen:

Project Roles

Role Name

Description


Access Level: Administrator Default: Mandatory: Use in Details Screen:

3. Enter the role name
4. Enter a job description in the larger description text box

The description should clarify the responsibilities and accountabilities of the role that you are creating. The access level of the role depends on what the role needs to do on the project.

5. Select the access level this role has. These roles will appear as shown below



Project Roles

Role Name

Description


Access Level	Default	Mandatory	Use in Details Screen
Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program Manager			
Project Manager			
Timesheet Admin			
Team Member			
None			
_Employer			




Description	Default	Charge Rate	Cost Rate
Ultimate client for the project scope (an NEC4 role)	No		
Ultimate client for the project works (an NEC3 role)	No		

6. Click the  icon.

You have successfully added a role


To edit a role:

1. Click on the edit  icon

Role	Description	Default	Charge Rate	Cost Rate	Mandatory	Use in Details Screen	Access Level
_Client	Ultimate client for the project scope (an NEC4 role)	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	Administrator   

2. Amend the role, description or access level



3. Click  to update all resources that have been assigned this role

You have successfully amended a role

Create a Resource Custom Field

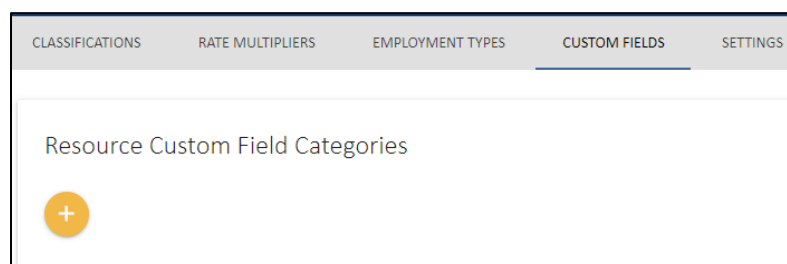
Resources within UniPhi are categorised as being

- Organisation – The trading entity or “brand” that you are dealing with. The organisation must have at least one site associated with it, and in some cases it may have multiple sites
- Site – The physical location of an organisation. The site will have a physical address, and will have one or more resources associated with it.
- Contact – A person. Each contact is created in UniPhi and can be a licenced user or can have no access and simply be stored in UniPhi for contact and CRM purposes. Each contact can be linked to one or more sites and organisations
- Asset – Broadly speaking assets are materials that relate to your project. Asset may be resources which have been procured in bulk quantities, which are then allocated to projects within your organisation. For example, your organisation may purchase a block of land, which it hopes to develop and sell off as individual units. In order to track and monitor the land asset, and the units which are built upon that land, UniPhi uses the Asset category

UniPhi’s flexible design allows an organisation to create custom fields per resource type. In practice this means a contact person may have specific details recorded against them, and this is also possible for an organisation, site, or an asset.

Create a resource Category

1. From the side menu, select *Configuration > Resources* and navigate to the Custom Fields tab.
2. Press the Add+ button under Resource Custom Field Categories.



- 3.

4. Enter the name of the resource category
5. Save your entry.



Create a Resource Custom Field

In order to create your resource custom field:

1. Scroll down to the Custom Field panel and select the type of resource custom field that you wish to create from the drop-down section menu.



2. Press the Add button and select the category that your field belongs to, provide a name for your custom field, and select the type of information that your custom field will capture.
3. Save your entry.

Once created, the resource custom fields will appear within the resource details for that particular resource type.

Programme Reporting

Key to UniPhi's unique features is its flexibility in the way that an organisations administrator user can configure much of the structure that other users will adhere to. The UniPhi administrator can create custom lists and fields throughout the various modules in the system so that the terms used, and the fields of information and meta-data captured are relevant to the particular organisation. The resulting fields describe the project and can be used to gain business intelligence on a single project, or across the entire portfolio. Once configured within UniPhi, managers and reviewers (e.g. Project and Program Managers) can view reports based on this specific data. For example, a consulting or sales company may wish to add a postcode or location project custom field to

determine and report on where most of their business is coming from, or which locations generate projects with the most income. Alternatively a construction company may be interested in the metrics associated with their buildings and hence may wish to capture measurements such as gross floor area.


UniPhi allows for the addition of numerous organisation specific customisations. Instructions below explain how to create these customisations via the creation of project custom fields, drop down lists, categories, and project custom lists.







Create Project Custom Fields

To create a project custom field:

1. From the side menu select *Configuration > Project*, navigate to the *Custom Fields* tab and scroll down to Custom Fields:

Custom Fields




Category	Order	Field Name	Unit Of		Project Type	Service Line	Location	Valid For	Field Type	Max Width	Max Height	Use in		
			Measure	Sector								Details	Is	
1 Building Functional Units	1	No Of Floors						Whole of Project	Number			No	No	 
1 Building Functional Units	2	No. of Car Parking Spaces						Whole of Project	Number			No	No	 
1 Building Functional Units	3	No. Of Lifts						Whole of Project	Number			No	No	 

Custom Fields

Field Name	Category None ▼	Valid For Whole of Project ▼	Order 174
Sector No Selection ▼	Project Type No Selection ▼	Service Line No Selection ▼	Location No Selection ▼
Field Type Text ▼	Use in Details Screen <input type="checkbox"/>		

+
×

2. Click the  icon to display the following screen:

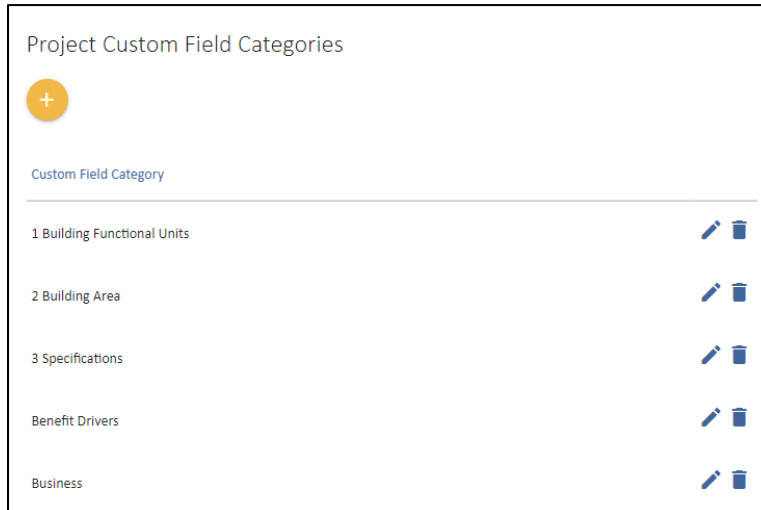
3. Select the relevant project custom field *Category* (if relevant).





It is possible to allocate project custom field to specific project categories, effectively links your custom fields to a particular project category. Larger or more complex UniPhi deployments may need a greater number of custom fields to be added in order that reporting requirements can be satisfied. Adding categories allows the company to report on a selection of project custom field data more easily. For example, a project may require multiple fields to be added regarding safety (i.e. number of lost time injuries, number of medical treatment injuries, number of first aid injuries, and number of working days lost etc.) If all of these custom fields have been assigned to the safety category then it is easy for Project Managers to report on all safety data by simply selecting the safety category when generating a report.



To add project custom field categories simply go to *Methodology > Project Custom Field Categories*



Click  , enter the name of your new category, and then click  . Repeat until you have added all required categories.

4. Enter the order number that you wish your custom field to appear in the *Project Details* box (1 for first, 2 for second, etc.).
5. Select the relevant project categories (*Sector, Project Type, Service Line and Location*) that your new custom field relates to. Leaving each of the category fields blank means your custom field will appear in every project.
6. Enter the name of your custom field in the *Field Name*
7. Select the type of custom field you wish to add by selecting the *Field Type* dropdown.



Custom Field Types: There are eight (8) different types of project custom fields.

Text: Allows the user to enter in limited text.

Number: Allows the user to enter in numeral digits when adding a new project

Currency: Captures financial information

Date: Allows the user to select or manually enter a date against the project.

List: Allows the end user to make a selection from a pre-defined drop-down list.

This will be demonstrated in the following exercise.

Check List: Allows the end user to make multiple selections from a pre-defined check list.

Field Type

- Text
- Rich Text
- Number
- Currency
- Date
- List
- Check List
- Image
- File

8. Select the period of time that the custom field is valid for. For this example select *Whole of Project*.

Valid For

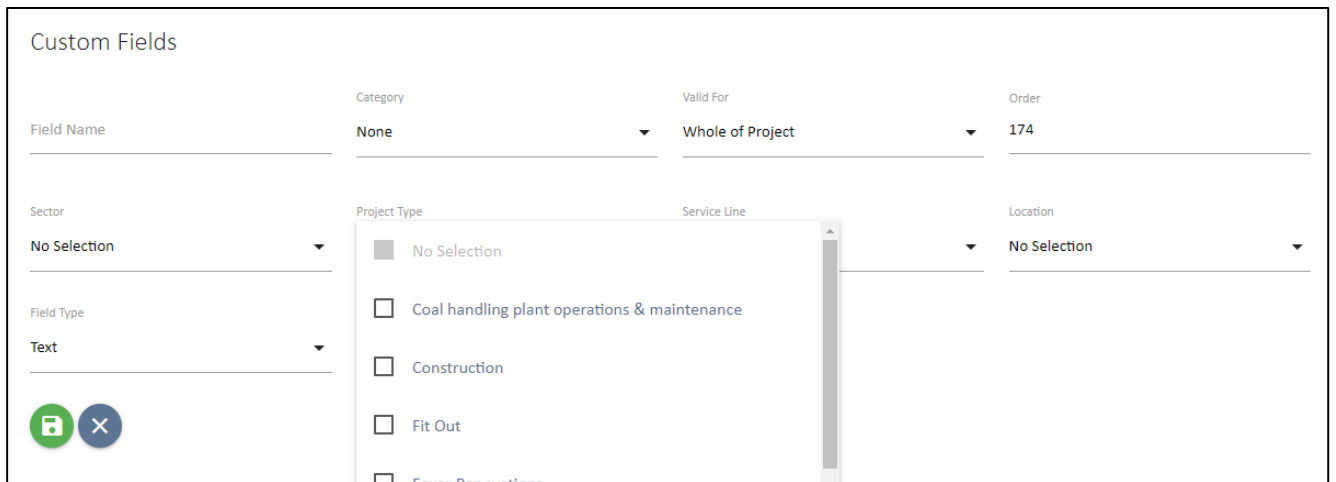
- Whole of Project
- Financial Period




Valid For: By indicating the period the custom field is valid for, you enable users to report on the information based on these periods - either the value is specified for the life of the project or is set every financial period.

Whole of Project: may be an extra level of project categorisation for reporting purposes over the entire project.

Financial Period: Used when you want to report on something (e.g. an occurrence such as the number of OH&S incidents) over a financial period.



9. Click the save icon  to save your custom field

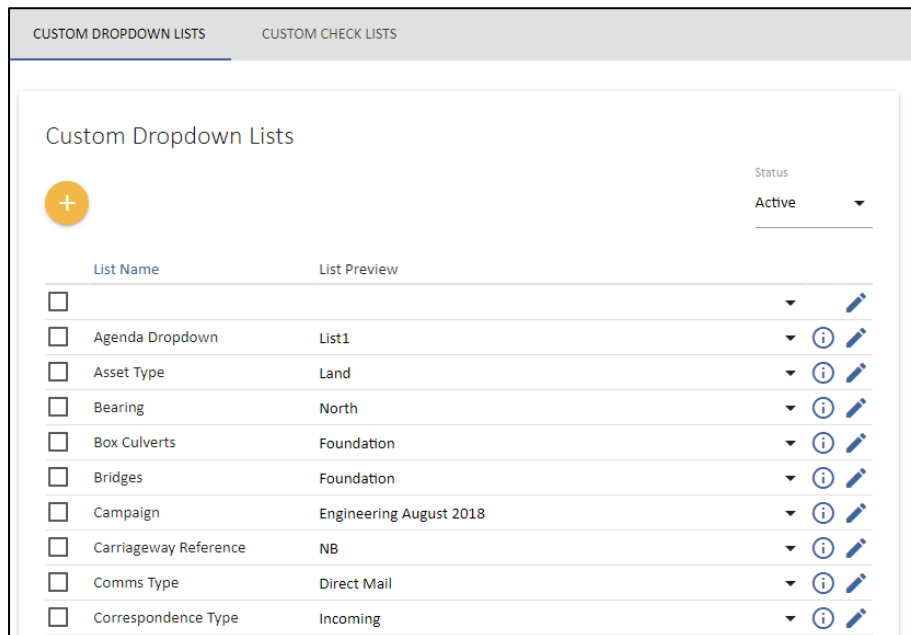
10. To view your new custom field, go to *Portfolio > Summary* and click the  icon to display the *Project Details* screen. Note the new custom field appears at the bottom of the *Project Details* box.



Create and Apply Custom Lists

To create a new Custom List:

1. Click *Configuration > Custom Lists* to display the *Custom Dropdown Lists* box:



The screenshot shows a web interface for managing custom dropdown lists. At the top, there are two tabs: "CUSTOM DROPDOWN LISTS" (selected) and "CUSTOM CHECK LISTS". Below the tabs, the main content area is titled "Custom Dropdown Lists". On the left, there is a yellow circular button with a plus sign (+) for adding a new list. On the right, there is a "Status" dropdown menu currently set to "Active". The main area contains a table with the following columns: "List Name", "List Preview", and a set of action icons (checkbox, dropdown arrow, info, and edit).



List Name	List Preview	
<input type="checkbox"/>		▼ ⓘ ✎
<input type="checkbox"/> Agenda Dropdown	List1	▼ ⓘ ✎
<input type="checkbox"/> Asset Type	Land	▼ ⓘ ✎
<input type="checkbox"/> Bearing	North	▼ ⓘ ✎
<input type="checkbox"/> Box Culverts	Foundation	▼ ⓘ ✎
<input type="checkbox"/> Bridges	Foundation	▼ ⓘ ✎
<input type="checkbox"/> Campaign	Engineering August 2018	▼ ⓘ ✎
<input type="checkbox"/> Carriageway Reference	NB	▼ ⓘ ✎
<input type="checkbox"/> Comms Type	Direct Mail	▼ ⓘ ✎
<input type="checkbox"/> Correspondence Type	Incoming	▼ ⓘ ✎


Custom Dropdown Lists

Enter List Name

Enter List Contents

Each item should be placed on a new line

2. Click the  icon to display the following screen:

3. Enter the name of your custom list and the list contents. Each item should be placed on

Custom Dropdown Lists

Enter List Name

List Preview



Enter List Contents

Land

Lot


Apartment

Each item should be placed on a new line


 

a new line. This is done by pressing the enter key after each item.





4. Click the  icon to save your list. Your new list should now appear in the *Custom Dropdown Lists* along with other lists that have been created.

To apply your custom list to projects:

1. To add your new custom list to projects go to the *Configuration > Project* view.
2. Click the  icon in the *Custom Fields* box
3. Give your project custom field a name (this does not have to match the name of list you created) and select list from the *Field Type:* dropdown.
4. The *Custom List* dropdown will appear. Select the list you created earlier.

Custom Fields

<small>Field Name</small>	<small>Category</small> None ▼	<small>Valid For</small> Whole of Project ▼	<small>Order</small> 85
<small>Sector</small> No Selection ▼	<small>Project Type</small> No Selection ▼	<small>Service Line</small> No Selection ▼	<small>Location</small> No Selection ▼
<small>Field Type</small> List ▼	<small>Custom List</small> Agenda Dropdown ▼	<small>Use in Details Screen</small> <input type="checkbox"/>	

5. Save your entry.

View your project custom list by going to *Portfolio > Summary* and drill into a project. This will display the *Project Details* screen, and as you scroll down through the project information you will notice that your custom list has been added.

Custom Fields


Safety List

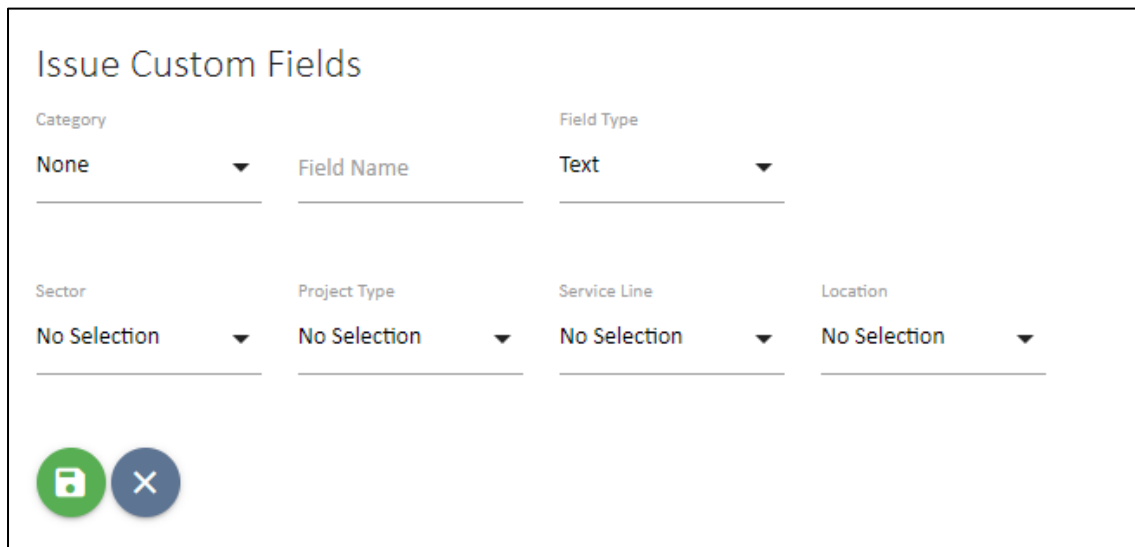
No Selection
LTI
Minor
Reportable

You now know how to create and apply custom lists

Custom lists are a very powerful and useful way to capture project specific information. Custom lists can be used in numerous places within UniPhi such as project summary, issues, and even document templates.

To apply your custom list to an issue category:

1. Ensure the issue category exists.
2. Click on *Configuration > Issue > Issue Custom Fields* and click 



3. From the drop down menu, select the custom list to be linked. You will now see this custom list in the *Issues* screen if the issue category is selected.



You now know how to create and apply custom lists to an issue category.



Issue and Risk Reporting through Categories

Managing issues and risks is important to reduce negative impacts on projects, and to generally collaborate and track progress towards intended outcomes. Within UniPhi, users can add issues and risks (through the relevant tabs), assign due dates, track actions & resolutions, or mitigation steps & triggers, and generate various reports to relevant stakeholders. In order to be able to view and analyse your risks and issues it is important to establish the categories as they relate to your organisation.




Create and Edit Issue Categories

Issue categories are used to identify issues according to their specific type, as well as to group issue information for use in documents and reports. When users log issues they can select the type of issue by specifying the issue according to the pre-defined list of categories.

To create an issue category:

1. Go to *Configuration > Issue* to display the *Issue Categories* box:

Issue Categories					
Issue Category	Sector	Project Type	Service Line	Location	
Bug					 
Change					 
Communications					 
Defects Management					 
Design					 


2. Click 

3. Enter the name of your new issue category and select the *Sector, Project Type, Service Line and Location*.

Issue Categories

Issue Category


Sector Project Type Service Line Location



 

4. Save your entry.

You have completed adding an issue category.

To edit an issue category:

1. Go to *Configuration > Issues* to display the *Issue Categories* box
2. Click the edit  icon to the right of the category you wish to edit.
3. Amend the category name:

Issue Category	Sector	Project Type	Service Line	Location	
<input type="text" value="Bug"/>	<input type="text" value="No Selection"/>	<input type="text" value="No Selection"/>	<input type="text" value="No Selection"/>	<input type="text" value="No Selection"/>	 

4. Save your entry.

You have completed editing an issue category

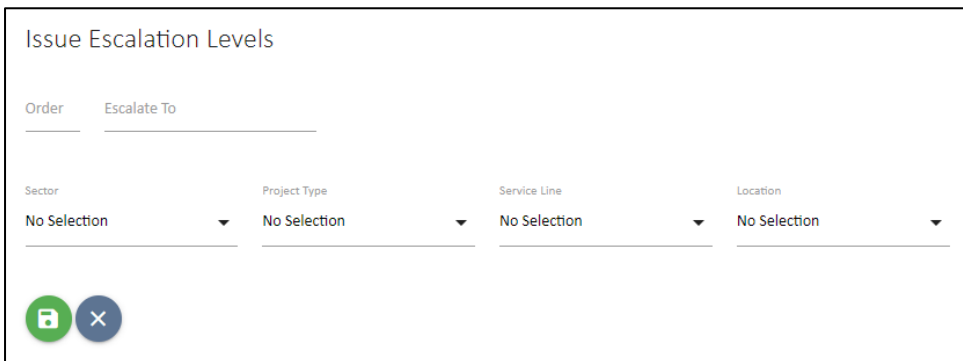
Create and Edit Issue Escalation



Issue escalation levels are designed to prioritise issues by ranking them against user specified levels. Escalation levels are a useful way to add an extra layer of escalation to the standard High, Medium, and Low issue levels. These levels of escalation can be named and ordered in any way desired.

1. Go to *Configuration > Issues > Issue Escalation Levels*.

2. Click the  icon



The screenshot shows a web form titled "Issue Escalation Levels". It has two input fields at the top: "Order" and "Escalate To". Below these are four dropdown menus: "Sector", "Project Type", "Service Line", and "Location". Each dropdown menu currently displays "No Selection". At the bottom left of the form, there are two circular buttons: a green one with a white document icon and a blue one with a white 'X' icon.

2. Order and name the escalation level
3. Select the *Sector*, *Project Type*, *Service Line* and *Location* as deemed appropriate.
4. Save your selection.



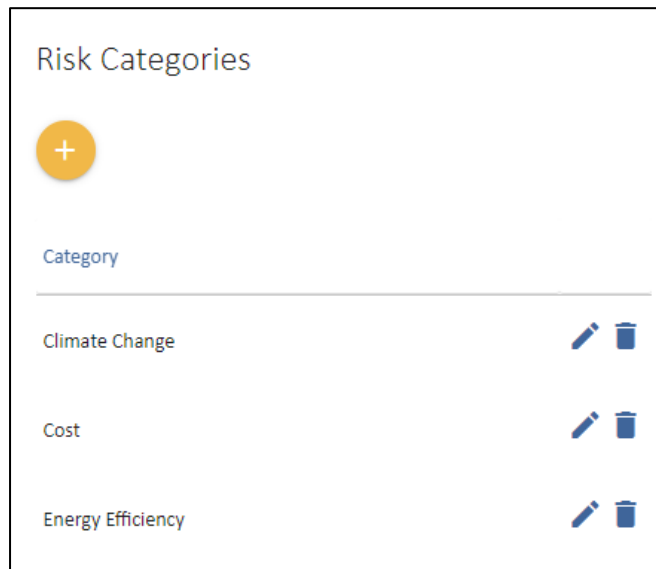
Note that issue escalation works from a top-down hierarchy level so that the level 1 escalation will only see items which have been escalated to that level, while those viewing escalation level 2 will see both level2 and level one escalations. This is by design and ensures that a person filtering for a level 1 issue is not distracted by a lower level of issue.


Create and Edit Risk Categories

Risk categories serve much the same purpose as Issue categories, and the process for creating and modifying them is largely the same.

To create a risk category:


5. Go to *Configuration > Risks* to display the *Risk Categories* box:



6. Click  and enter a category. Save your entry.

You have completed adding a risk category.

To edit a risk category:

5. Go to *Configuration > Risks* to display the *Risks Categories* box
6. Click the edit  icon to the right of the category you wish to edit.
7. Amend the category name and save your entry.

You have completed editing a risk category


Create and Edit Risk Escalation

Risk escalation levels are designed to prioritise risks by ranking them against user specified levels. These levels of escalation can be named and ordered in any way desired.


1. Go to *Configuration > Risks > Risk Escalation Levels*.

RISK CATEGORIES	RISK STATUS	RISK ESCALATION LEVELS	RISK LIKELIHOODS	RISK CONSEQUENCES
-----------------	-------------	------------------------	------------------	-------------------

Risk Escalation Levels



Order	Escalate To
1	Board
2	Steering Committee
3	Programme Manager

2. Click the  icon
3. Order and name the escalation level. Save your entry.

You have now created a risk escalation



Risk Management via Risk Matrix

Risks are events or actions that, if they occur, have the potential to hinder the progress of a project and impact negatively on a project. Identifying risks to a project, determining the probability or likelihood that the risk will occur, and what impact or consequence the occurred event will have on the outcomes of a project is essential analysis, and is the responsibility of the Project Manager.


Establishing and configuring a risk matrix aids this process. A risk matrix multiplies a risk's likelihood rank by its consequence rank to produce a risk level. UniPhi allows for these rankings and level to be established and applied to all identified project risks.



Create and Edit Risk Likelihoods



To add risk likelihoods:

1. Go to *Configuration > Risks* and scroll to the *Risk Likelihood* box

2. Click the  button to display the following fields:

Risk Likelihoods

Likelihood	Rank	Description
<input type="text"/>	0	<input type="text"/>

3. Enter the likelihood of an event occurring




Likelihood: There are numerous ways to measure a risk's likelihood, and the values you use are determined by your organisation or by a project's risk management plan. Example likelihoods could include quantitative or numeral values, from 0 to 10, with 0 being the least likely and 10 being the most likely. Some qualitative values commonly used are rare, unlikely, possible, likely, certain.

4. Assign a rank to each likelihood:
5. Add a description of the risk likelihood. This will ensure consistency of understanding when people create and assess risks. Save your entry.
6. Repeat the process to complete adding all risk likelihoods:

You now know how to add risk likelihoods



To edit risk likelihoods:

7. Go to *Configuration > Risks* and scroll to the *Risk Likelihood* box
8. Click the  button to the right of the likelihood you wish to edit:
9. Amend the likelihood and/or rank
10. Save your entry.

You now know how to edit risk likelihoods

Create and Edit Risk Consequences

To add new, and edit existing risk consequences, follow the same steps that you used to create and edit risk likelihoods.




Consequences: As with risk likelihoods, there are numerous of ways to measure a risk's impact and the terms or values you use will be determined by your organisation or by a project's risk management plan.







Some example consequences could be:

- *Quantitative or numeric values:* 0 to 10 with 0 being insignificant and 10 being extremely serious.

- *Qualitative values:* negligible, marginal, critical, and catastrophic.

Risk Consequences




Consequence	Rank	Description	
Mitigated	0		 
Little Impact	1	A minor issue will ensue	 
Small Change	2	Can manage the impacts within the current scope, cost, quality and time aspects of the project	 



Add Risk Levels



To Add Risk Levels:



1. Go to *Configuration > Risks* and scroll to the *Risk Levels* box

2. Click on the  button. The below fields will be displayed:

Risk Levels

Risk Level	Rank	Icon
<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="Orange"/> ▼

Level	Rank	Icon
Very High	1	
High	2	


3. Enter in the *Risk Level* and *Rank*, and select an icon colour to represent the level you are creating.








Risk levels and icons in UniPhi: UniPhi allows for creation of 5 risk levels, graphically represented by 5 icons. These icons are based on typical RAG (red, amber, green) traffic light indicators, but to allow users to define risk levels in greater detail, red, orange, yellow, blue and green icons can be selected.

See the two examples below, which illustrate risk level options in UniPhi:

Risk Levels



Level	Rank	Icon
Very High	1	
High	2	
Med	3	
Low	4	
Very Low	5	

Organisations must determine their own risk levels within the risk matrix functionality.

4. Save your entry.
5. Repeat the process to complete adding all risk levels

You now know how to add risk levels in UniPhi



Apply Risk Levels to the Risk Matrix

Once you have entered your organisation or project risk likelihoods, consequences and levels, you are able to use this information to construct the risk matrix. The risk matrix “multiplies” the risk likelihood by the risk consequence, resulting in a calculated risk level. Managers use this information to prioritise and manage project risks.

UniPhi automatically populates the risk matrix using the likelihoods and consequences already created. The next step required to complete the matrix is for levels to be applied to each of these combinations.

Once you have created your matrix, and go to add actual risks to a project, you will be asked to select the likelihood and consequence for each risk. Based on the matrix, a risk level and traffic light icon will be applied to the risk automatically.

To create a risk matrix:

1. Go to *Configuration > Risks* and scroll to the *Risk Matrix* box:

Risk Matrix

📁

Likelihood	Consequence	Level
Completed	Mitigated	None ▼
Completed	Little Impact	<div style="background-color: #f0f0f0; padding: 2px;">None</div> <div style="padding: 2px;">Very High</div> <div style="padding: 2px;">High</div> <div style="padding: 2px;">Med</div> <div style="padding: 2px;">Low</div> <div style="padding: 2px;">Very Low</div>
Completed	Small Change	
Completed	Change Request	
Completed	Threaten Project	
Unlikely	Mitigated	None ▼

2. Use the *Level* dropdown to select the appropriate level, based on the likelihood and consequence of the risk.
3. Repeat the process until all combinations have a level applied.
4. Save all your entries.

You now know how to create a risk matrix in UniPhi.



Contract Methodology Configuration

Contract Methodology through Contract Status

Managing contracts is simplified in UniPhi with the ability for administrators to establish contract statuses. By indicating which contracts statuses are committed users are aware that they intend to raise progress claims, variations, EOTs and a variety of other post contract documentation against contracts that have not yet been committed or have been completed / cancelled.

Contract statuses are usually established during UniPhi deployment but can be added to or amend to align with current contract methodology:

To create, edit and delete Contract Status:



1. Go to the *Configuration > Contract status* tab:

Contract Status				
Order	Status	Provisional	Committed	Cancelled
1	Pending	No	No	No
2	Active	No	Yes	No
3	Expired	No	Yes	No
4	Cancelled	No	No	Yes

2. Click  and the following fields will be displayed:

Contract Status

Order	Status	Provisional	Committed	Cancelled	Can Timesheet
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

F
X

3. Enter in the name of your new *Status*
4. Enter in the *Order* of your new status (this is the order it will appear in the status dropdown)
5. Indicate if the status is a committed contract status or not.



Committed: project cost reports will only display committed contract values so unless a contract status is committed it will not appear in reports.

6. Indicate if the contract status has a cancelled property.



Cancelled: This flag is used in reports both from an internal submission basis and an external tender analysis basis. Information can be used to report on ratios of contracts won and lost, manage tenders and collate benchmark data on \$ ranges for competitive versus not so competitive tenders.

In the example displayed below a number of cancelled statuses have been added to align with the organisation’s own methodology and allows users to report in more detail why the contract was cancelled:

7. Save your entry.

You now know how to add a new contract status



To view your new contract status go to the *Portfolio > Contracts* tab and select a

project from the *Project* filter. Click



in the *Contract Summary* box and fields

will be displayed that allow you to add a new contract to your project. Note that the status dropdown now includes the status you just added:

Add New Contract

Type

Select Type PO No Contract No Contract Name

Customer Care Of Supplier

No Selection No Selection No Selection

Status

Pending
 Active
 Expired
 Cancelled
 Provisional Sum

Submitted



Awarded

Commencement

Practical Completion


Currency Tax Payment Terms



AUD GST Input 30 Days






If you were to select *withdrawn* your contract will contain the properties associated with that status.

To edit a Contract Status:

1. From the *Configuration > Contract status* tab, *Contract Status* box click on the  edit icon to the right of the status you wish to amend:


Order	Status	Provisional	Committed	Cancelled	Can Timesheet	
1	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✓	 

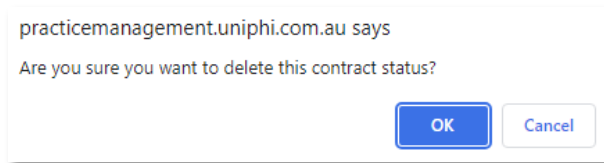
2. Edit the order, name or committed / cancelled properties of the contract status
3. Click the  save icon to complete editing your contract status
4. Click the  cancel icon if you want to cancel editing your contract status.

You now know how to edit a contract status



To delete a Contract Status:

1. Click the  delete icon to the right of the contract status you wish to remove
2. You will be asked to confirm that you really want to delete the item:



3. Click 



You now know how to delete a contract status

Contract Methodology through Contract Standards


UniPhi allows for the addition of contract standards so that the user can specify the relevant Australian Standard when adding a new contract.

To add, edit and delete Contract Standards:

1. Go to the *Configuration > Contract* and navigate to the *Contract Standards* box:

Contract Standards						
						
Standard	Description	Sector	Project Type	Service Line	Location	
AS4000-1997	General conditions of contract					 
AS4122 - 2010	Consultants					 
AS4300 - 1995	Design & Construct					 






2. Click the  button. Enter in the Standard and a brief description:

Contract Standards

Standard

Standard		Description	
Sector	Project Type	Service Line	Location
No Selection ▾	No Selection ▾	No Selection ▾	No Selection ▾

3. Save your entry.
4. To edit or delete an existing contract standard, use the  edit delete icons to the right of the relevant standard.

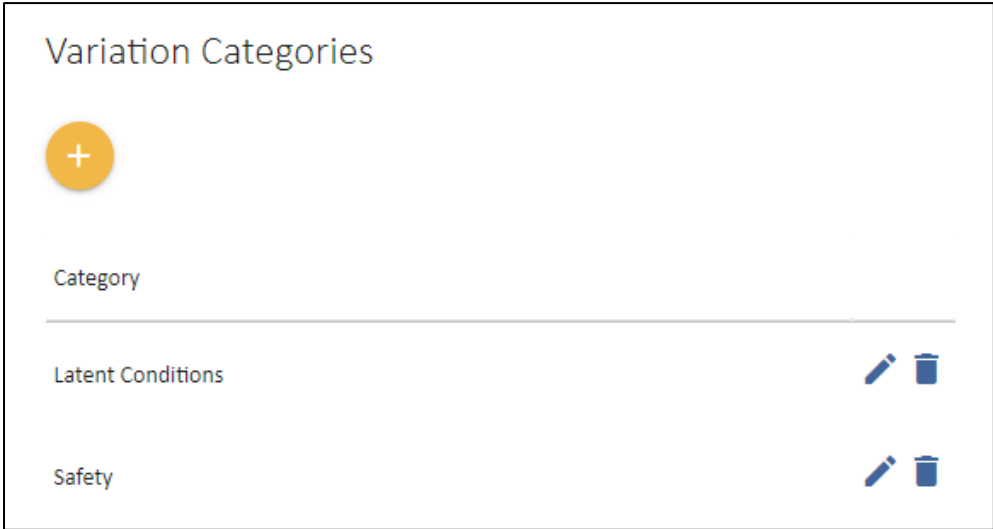
You now know how to add, edit and delete Contract Standards.


Contract Methodology through Variation Categories

As contracts are let and the project progresses, it may be necessary to work with variations to the agreed contract. Variations are raised within the contract classified as being potential, pending, approved and rejected. As an additional level of management for variations, an organisation can specify the category of variations that are available to the end user.

Creating Variation Categories

1. From the *Configuration > Contract* tab, navigate to *Variation Categories*.

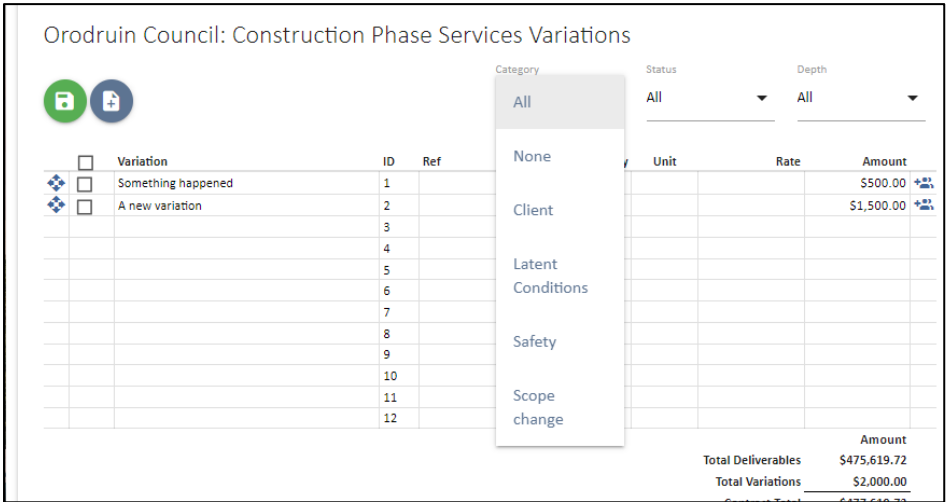


2. Press the  button
3. Enter a description to your variation category and save your entry.

Specifying a Contract Variation Category

Once variation categories have been created, they can be specified within a contract where a variation has occurred.

Notice that the contract variation panel will display a drop down menu of available variation categories.





Workflows using the Issue system

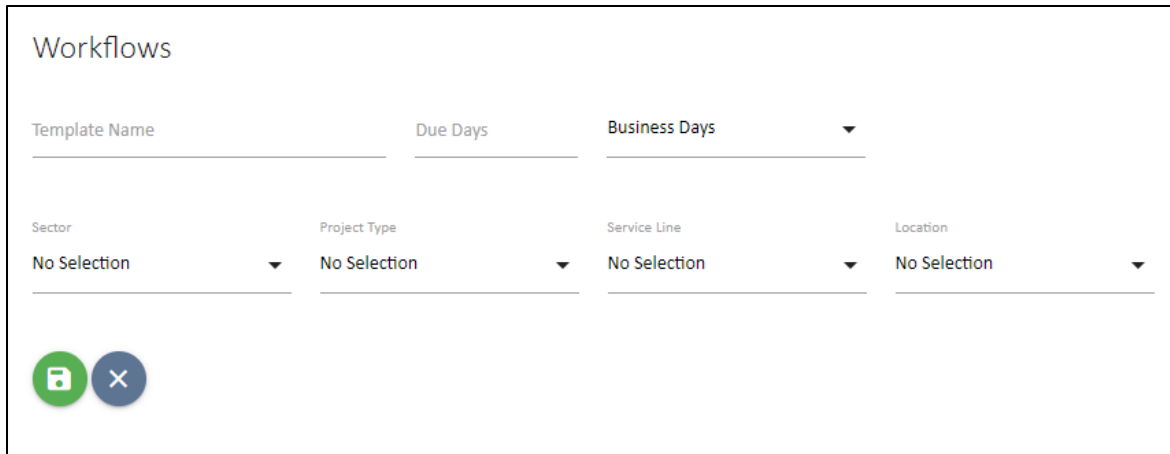
The Issues tab is designed to log, track, and report on issues relating to a project. Often issues are common to many projects and the same steps or actions need to be carried out to resolve it, and in some cases actioned by the same roles. Further, if the time taken to complete the actions is the same it can be determined using the issue template functionality, automatically calculating a due date for the common issue once the template is applied.

This functionality can be used for common issues and also common tasks. For example, a template can be created to facilitate the workflow required to carry out a progress claim.



Add an Issue Template

1. Go to *Configuration > Issues > Workflows* tab and navigate to the *Issue Templates* tab






2. Enter in the name of your issue template
3. Determine if the *Due Days* field is to be calculated using business days or elapsed days
4. Select the relating *Sector, Project Type, Service Line and Location* for the issue template.




Due Days: Due days refers to the number of days required to complete all actions and close out the task/issue. The System Administrator is able to use the drop down list to specify how the due date is calculated, based on the number of days entered. Where business days is selected, UniPhi will ignore weekends and calculate a due date further in the future. Where elapsed days is selected, UniPhi will include Saturday and Sunday and the resulting due date will be sooner than if business days was selected. UniPhi defaults to business days.

5. Save your entry.

Name		Due Days							
Early Warning Notice		10		Business Days ▼					
Sector		Project Type		Service Line		Location			
No Selection ▼		No Selection ▼		No Selection ▼		No Selection ▼		 	
Action				Due Days		Assign To Role			
						None ▼			










Note that the *Due Date* field has automatically defaulted to 0. As actions and the number of days *after* the issue or action was triggered that the action is due are entered, UniPhi will automatically update the final *Due Date* field. For example, if an issue is triggered on a Tuesday and the first action is required to be completed 3 days later, UniPhi will calculate the due date as being Thursday, (i.e. Tuesday, Wednesday and Thursday allocated to complete the first action). System Administrators must enter in the due days based on when the issue or action was triggered, NOT based on when the previous action was completed.

6. Enter the first action, the number of days *after* the issue or task was triggered that the action is due, and select the relevant role that will carry out the work:
7. Click the  icon to add the first action and all subsequent actions:
 Note that the *Due Days* field has increased to 10 days, with the first action due 1 day after initiation, and the second action due 5 days after the first action.


Name	Due Days		
Contract Dispute - AS4122	20	Business Days	▼

Sector	Project Type	Service Line	Location
No Selection ▼	No Selection ▼	No Selection ▼	No Selection ▼

Action	Due Days	Assign To Role	
Send Service of Notice Document	3	Contract Administrator ▼	  
Schedule meeting for dispute resolution	5	Cost Manager ▼	
Something new	5	Managing Contractor ▼	
Confer for dispute resolution	10	Cost Manager ▼	

8. Amendments can be made at any time and are saved by clicking the  button
You have successfully created an issue template

Issue Templates in action

1. To test your new template, go to *Portfolio > Issues* tab and select a project from the *Project* dropdown.
2. Click  to add a test issue
3. Enter in the name of your issue, select the resource that is responsible for the issue or task, and select the template you created from the *Template* dropdown. Next, select a rating for the issue (if nothing selected UniPhi defaults to a medium rating).


Add New Issue


Issue Description

Category: **None** | Assigned To: **No Selection** | Escalation Level: **None**


Template: **None** | Rating: **Med** | Due Date: _____

- None
- Contract Dispute - AS4122
- Early Warning Notice
- Initial Design Review
- Insurance Renewal
- NCR

B I U ABC | 

4. Click  to save and view your issue actions:

Actions



<input type="checkbox"/>	Issue Actions	Assigned To	Due Date	Complete
<input type="checkbox"/>	Confer for dispute resolution	Sean Bean	20 Oct 2023	No
<input type="checkbox"/>	Commence legal proceeding	Jo Bloggs	03 Nov 2023	No
<input type="checkbox"/>	Schedule meeting for dispute resolution	Sean Bean	13 Oct 2023	No
<input type="checkbox"/>	Something new	Arthur Williams	13 Oct 2023	No
<input type="checkbox"/>	Send Service of Notice Document		11 Oct 2023	No

Note that *Actions*, *Resources* and *Due Dates* have been automatically generated based on your template and the day the issue was created.



Financial Management

Chart of Accounts

Budgets, actual and forecast, fees and costs, are managed through UniPhi according to the chart of accounts (CoA). The CoA will typically match your company accounting system structure, however, if you are managing projects on behalf of clients, then the CoA may include both your company accounts and a project CoA for project budgeting. Hence, it is possible to develop multiple CoA's.

There is a tight integration between cost and revenue modules, and the contracts module. For example, once a budget is established in the costs system, cost contracts are apportioned to that budget, allowing the project manager to check committed versus budget, and forecast to complete costs.

The chart of accounts (or charts, if you have multiple) allows for multiple levels of detail to be defined as a hierarchy structure. There are two ways to set up cost codes in UniPhi: a file upload, or a user interface for data entry.

Chart of Account Types

There are three types of chart of accounts:

- Project costs - Use project cost if you are managing project costs on behalf of a client. You or your organisation are NOT actually paying these costs
- Internal revenue - Use internal revenue if you are tracking fees received for goods or services. You or your organisation are receiving money for these items
- Internal costs - Use if you are tracking internal company or project costs. You or your organisation ARE paying these costs.

Project costs charts are used for project cost reports. These charts can be linked to internal cost charts if the deployment is for internal project management. The cost elements set up in this chart determine how budget information will be reported on a project.

Internal revenue and internal cost charts are for tracking either project profitability from a professional services practice management perspective, or cost benefit analysis from an internal project business case perspective. Default reports in UniPhi use these two chart types to define revenue and expense, as well as benefits and costs. Example reports include portfolio profitability, project profitability, free cash flow, and cost benefit analysis reports.



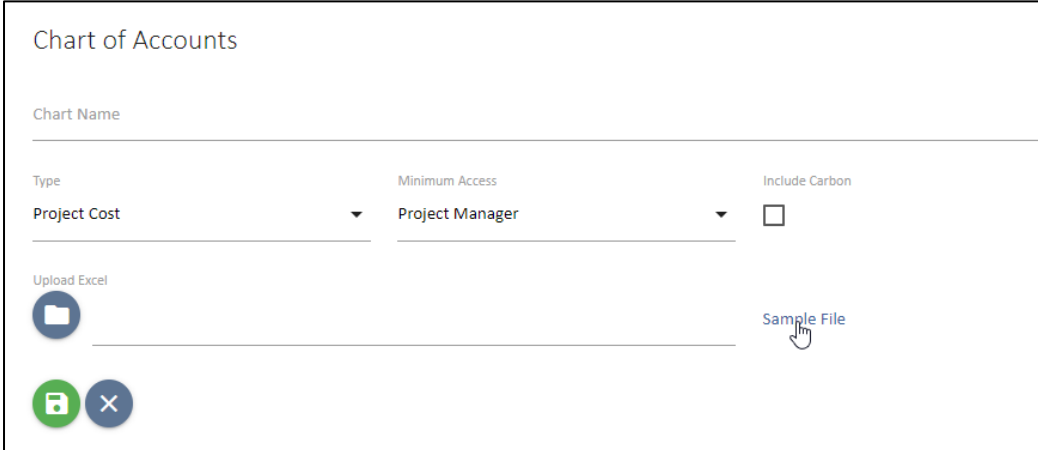
Create Chart of Accounts through Import

There are two methods for creating a chart of accounts. If your chart is large and comes from an accounting system then you may like to import the list. **You will need to export your finance system fields to match the sample Excel file provided, for this to work.**

To view a sample Excel file:

1. Access the account codes section by browsing to the *Configuration > Chart of Accounts*

2. Select the  icon:



3. Click on the **Sample File** link. A pop up will ask if you wish to open or save the sample file:
4. Open the file in Excel by clicking OK. The Excel sample will be launched:

	A	B	C	D	E	F	G	H
1	Code1	Description1	Code2	Description2	Code3	Description3	Code Type	Contingency
2	01	IT						
3			01.01	Software				
4					01.01.01	Design	Type A	
5					01.01.02	Development	Type A	
6					01.01.03	Testing	Type A	
7			01.02	Hardware			Type B	
8			01.03	Support			Type B	
9	02	Contingency						
10			02.01	Contingency 1				Yes
11			02.02	Contingency 2				Yes

To create a chart of accounts by importing an Excel file:



Structure: The first row of the sample file contains the data structure that must be followed for a successful import.

Chart of Account levels: Your chart of accounts can be defined to the level of granular detail that suits your organisation. For example you may have a high level COA structure which simply classes all income as “Revenue” or “Sales”. Alternatively you may have a cost COA that breaks down Contractors, Consultants, Marketing and Materials; and then within Marketing for example you have a second level that breaks down the categories of marketing that you purchase. You may even categories the types of marketing types specified down to a third or even fourth level.

	A	B	C	D	E	F	G	H
1	Code1	Description1	Code2	Description2	Code3	Description3	Code Type	Contingency
2	A1	Marketing						

1. To create a secondary level for marketing, enter the first sub-code in column D with an appropriate code in column C.

	A	B	C	D	E	F	G	H
1	Code1	Description1	Code2	Description2	Code3	Description3	Code Type	Contingency
2	A1	Marketing						
3			A1.1	Print				

2. If your secondary level item (A1.1 Print) needs to have more codes on the next level, enter these code in column F with the appropriate code in column E.

	A	B	C	D	E	F	G	H
1	Code1	Description1	Code2	Description2	Code3	Description3	Code Type	Contingency
2	A1	Marketing						
3			A1.1	Print				
4					A1.1.1	Newspaper	Type A	
5					A1.1.2	Magazine	Type A	
6					A1.1.3	Flyers	Type A	

You may keep adding additional levels to your COA structure by following the logic within the sample file – where CodeX and DescriptionX are mapped along your excel columns

Code types can be specified in the next column after specifying all the different levels required in the chart of account.



Code types: are yet another way of categorising the type of COA item that you are entering. As an example you may have code types specified for Opex and Capex, or Site Costs and Building Costs.

Contingency codes can be specified by typing “Yes” in the cell. You may have multiple forms of contingency specified at any level of your CoA structure.

	A	B	C	D	E	F	G	H
1	Code1	Description1	Code2	Description2	Code3	Description3	Code Type	Contingency
2	A1	Marketing						
3			A1.1	Print				
4					A1.1.1	Newspaper	Type A	
5					A1.1.2	Magazine	Type A	
6					A1.1.3	Flyers	Type A	
7			A1.2	Online			Type B	Yes
8			A1.3	Television			Type B	Yes

Once the chart of account has been entered into your excel sheet, the range name needs to be specified. The range name “CoA” can be edited via the Name Manager by either modifying the range of the existing CoA name, or deleting and recreating the CoA name range.

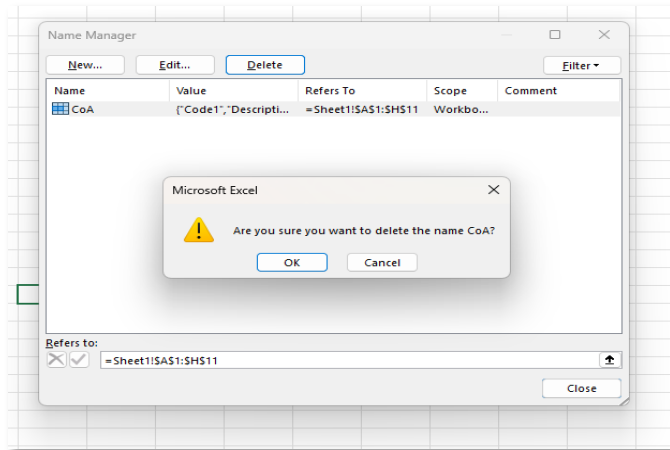


Figure 5 Deleting a defined name range

Once deleted, the new range name can be specified by highlighting the range and naming it “CoA”

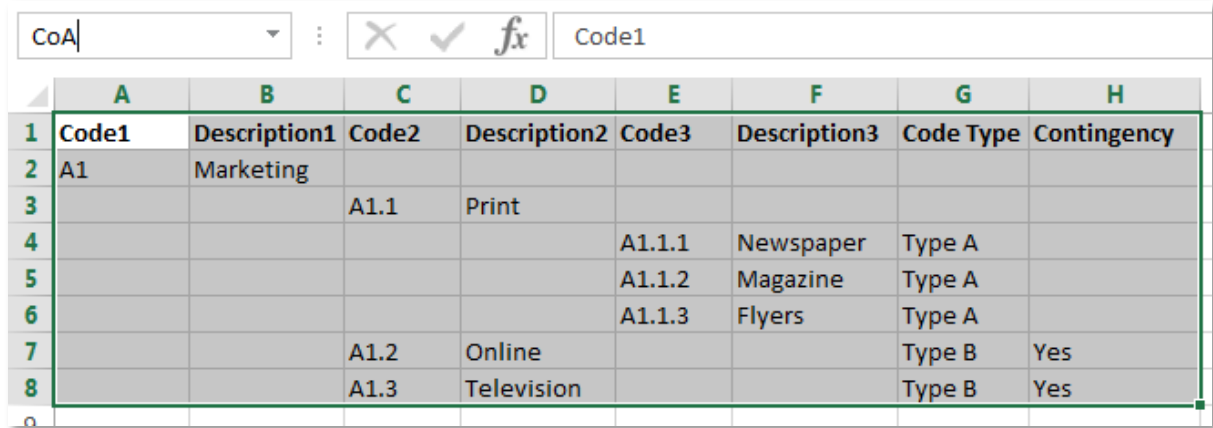
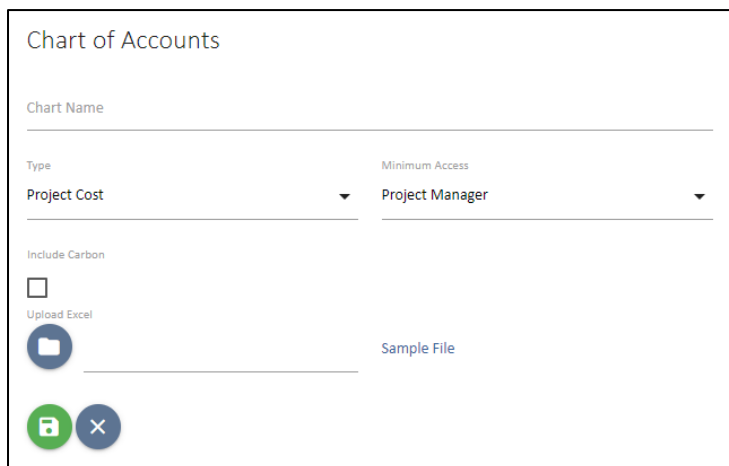


Figure 6 Creating a new name range called CoA (case sensitive)

Once this is done, save the Excel file.

To import the Excel format chart of account into UniPhi:

1. Select *Browse*, select the saved Excel file and click the *Import* button.



Project Costs: Select project cost if you are managing project costs on behalf of a client.

Internal Revenue: Select internal revenue if you are tracking fees received for goods or services

Internal Costs: Select if you are tracking internal company or project costs.

You now know how to import cost codes



Create Chart of Accounts through Data Entry

To create a new chart of accounts manually:




1. Go to the *Admin > Chart of Accounts* tabs, click on the  button. Enter the name that describes your new CoA and select the type:


Chart of Accounts

Chart Name
New Cost CoA

Type: Project Cost Minimum Access: Project Manager Include Carbon:


2. Your new chart of accounts entry will appear in the list of charts:

New Cost CoA	Project Cost	Project Manager	No	 
------------------------------	--------------	-----------------	----	---


3. Click on the hyperlinked label “New Cost CoA” in order to add each of the relevant header categories:







New Coast CoA Account Codes View
Active

Account Code	Code Type	Is Contingency
Project		No
01 - IT		No
01.01 - Software		No
01.01.01 - Design	Type A	No
01.01.02 - Development	Type A	No
01.01.03 - Testing	Type A	No
01.02 - Hardware	Type B	No
01.03 - Support	Type B	No
02 - Contingency		No
02.01 - Contingency 1		Yes
02.02 - Contingency 2		Yes

4. Save your entry. You will notice a  icon. To enter a new secondary level code, click into it and enter the relevant code details:


01.01- Software Sub Codes View
Active



Sort	Code	Description	Code Type	Is Contingency
1	01.01.01	Design	Type A	<input type="checkbox"/>  
2	01.01.02	Development	Type A	<input type="checkbox"/>  
3	01.01.03	Testing	Type A	<input type="checkbox"/>  
4			None	<input type="checkbox"/>
5			None	<input type="checkbox"/>

New Coast CoA Account Codes View
Active

Account Code	Code Type	Is Contingency
Project		No
01 - IT		No
01.01 - Software		No
01.01.01 - Design	Type A	Yes
01.01.02 - Development	Type A	No
01.01.03 - Testing	Type A	No
01.02 - Hardware	Type B	No

5. UniPhi will let you map your chart accounts to multiple (n level) levels of detail. In order to add a new sub-level to your chart of accounts you simply need to save and then click into the code that you have created. Alternatively you may click on the  icon.



Cost versus Revenue CoAs and Contingency Codes: In the example above a Cost chart was created. When creating a cost chart of accounts the *Is Contingency*

Financial Years

UniPhi has the ability to track the monthly actual, forecast and budgeted revenue and expenditure and report on these on a financial year basis. To be able to do this, the relevant financial years of the company need to be established. You can pre-populate as many financial years as is necessary (past and future). These financial years will be available to users via drop down boxes in the cost and fees tabs. The more financial years entered the more options in the drop down list options available. For this reason, it is common for only 3-5 financial years be available at any one point in time. More financial year periods may be required if the project runs over a number of years and the business would like to time-phase the cash flows over the entire project period.

Once a financial period is completed and the accounts signed off, the financial period is closed. Individual month periods can be closed out sequentially, or an entire financial year can be closed at one time. Once a period (month or year) is closed:

- All timesheets are marked as submitted and it submits any saved time that had not been submitted for that period
- No one can timesheet to that period.
- Cash flow phasing interfaces in the system show actual for that period instead of forecast.
- The API shows actual for that period and clears the forecast (this makes it easier for Act/fcst graphing)

Other business rules relate to accounting integration and are not relevant here including closing a financial year (won't import actuals for that year once closed for example).


















Create Financial Years and Periods

To create a financial year:

1. Click on the *Configuration > Financial Years* tabs

Financial Years





Year	Description	Start Date	End Date	Period Closed	
2030	2029/2030	01 Jul 2029	30 Jun 2030	No	 
2029	2028/2029	01 Jul 2028	30 Jun 2029	No	 
2028	2027/2028	01 Jul 2027	30 Jun 2028	No	 
2027	2026/2027	01 Jul 2026	30 Jun 2027	No	 
2026	2025/2026	01 Jul 2025	30 Jun 2026	No	 
2025	2024/2025	01 Jul 2024	30 Jun 2025	No	 
2024	2023/2024	01 Jul 2023	30 Jun 2024	No	 

2. Click on the  icon to display the following:

Financial Years

Start Date End Date Period Closed

3. Enter the start and end dates for a financial year and indicate if the financial year has been closed:

Financial Years		
Start Date	End Date	Period Closed
9/10/2023	28/10/2023	<input type="checkbox"/>



Note it is possible to enter a shortened financial year if for example UniPhi is deployed a portion of the way through a financial year, or a company changes its financial year period. The *Period Closed* tick box allows you to indicate single period or entire financial years where accounts have been finalised, which prevents data being entered against that year.

4. Save your entry


You have successfully added a financial year





Edit, Close, or Re-Open Financial Years


To edit or close a financial year:

1. Click on the *Configuration > Financial Years* tab

2. Click on the edit  icon to the right of the year you wish edit:

Year	Description	Start Date	End Date	Period Closed
2030	2029/2030	1/07/2029	30/06/2030	<input type="checkbox"/>  

3. Amend the financial year dates or tick the Period Closed tick box if you wish to close it, or un-tick if you wish to re-open it.

4. Click on the save  icon.



Note the financial year is a filter. Data entered against a particular month is captured at that point in time. If that month is no longer within a financial year period it will no longer be displayed in the accounting costs for that project. However, if this period becomes within a financial year period again, it will be re-displayed. In other words, the data is not lost, it is simply filtered out.

You have successfully amended a financial year




Non Standard Financial Periods















UniPhi allows you to create financial periods within a financial year to align with your company’s accounting periods. Though most organisations use monthly financial periods within financial years, UniPhi can be configured for non-standard periods such as quarterly. As with financial years, closing periods means that accounts have been finalised for that period, which prevents data being entered against it.

To amend to quarterly financial periods:



1. From the *Configuration > Financial Years* tabs, click on the financial year that you would like to change. The *Financial Periods* box will be displayed:



Financial Periods








Period	Description	Start Date	End Date	Period Closed	Reporting Closed	Productivity	
1	Jul 2029	01 Jul 2029	31 Jul 2029	No	No	100%	 
2	Aug 2029	01 Aug 2029	31 Aug 2029	No	No	100%	 
3	Sep 2029	01 Sep 2029	30 Sep 2029	No	No	100%	 
4	Oct 2029	01 Oct 2029	31 Oct 2029	No	No	100%	 
5	Nov 2029	01 Nov 2029	30 Nov 2029	No	No	100%	 
6	Dec 2029	01 Dec 2029	31 Dec 2029	No	No	100%	 
7	Jan 2030	01 Jan 2030	31 Jan 2030	No	No	100%	 

As periods cannot overlap, you will need to initially delete months that will be included in your first quarter.

- Click the  icon next to the monthly periods that you wish to include in your quarter. In this case August and September.
- Click the  edit icon next to the July quarter and enter in the correct description and start & end dates for your period. Indicate if the period is open or closed:

Period	Description	Start Date	End Date	Period Closed	Reporting Closed	Productivity	
6	1st Quarter	01 Oct 2029	31 Dec 2029	No	No	100%	 

- Click the  icon and repeat the above process to complete amending / adding your organisation's quarterly financial periods:
- As with closing financial years, click the  edit icon to indicate that the financial period has been closed. Save by clicking the  save icon:

Period	Description	Start Date	End Date	Period Closed	Reporting Closed	Productivity	
6	1st Quarter	1/10/2029	31/12/2029	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100%	 

You now know how to create, amend and close off financial periods.



Integration through Templates

UniPhi documents are conveniently stored and available “online” as HTML web-based documents via the web application, and offline via the OnSite mobile app. Each document is created from templates that have been built using the UniPhi template system.

UniPhi documents are used for four purposes:

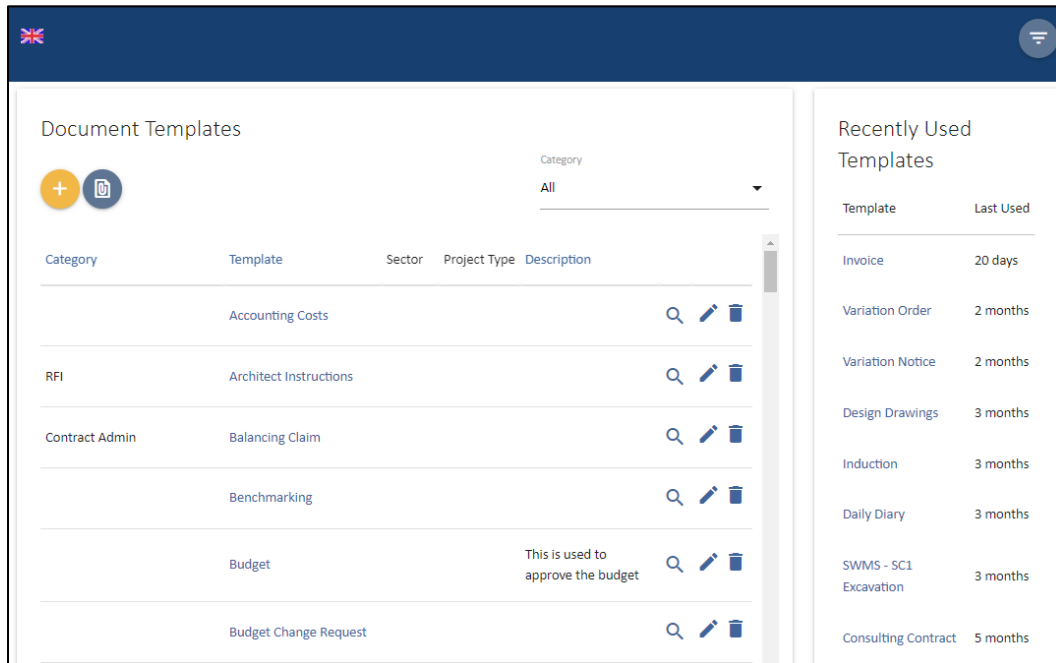
1. To integrate information that exists across the tabs (e.g. risk, issues, and contract information into one document)
2. To share information with people who do not have access to UniPhi
3. To provide quality control around the information stored in UniPhi
4. As a method of capturing information (e.g. inspections conducted on the OnSite mobile app)

UniPhi achieves the first point through the use of document controls and template variables.

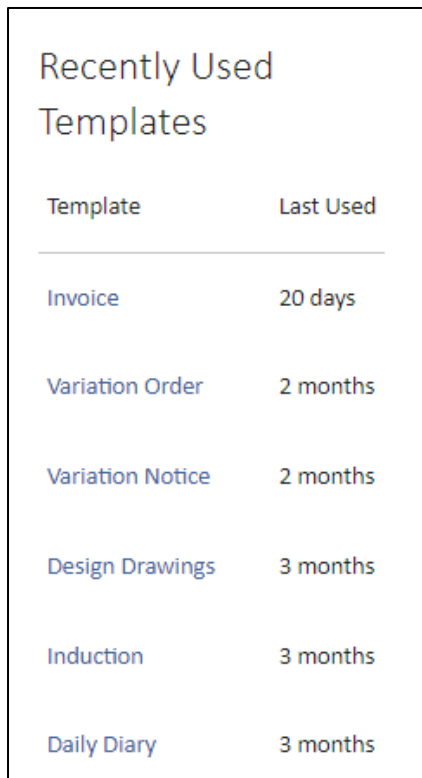
Document Controls are the template design objects that query the data in the UniPhi database and display this information in pre-defined views. Each document controls is designed to present data which already exists in UniPhi, thus reducing the risk of copy/paste errors and manual data entry. In some cases these controls are fully pre-determined and cannot be changed by the user, while other steps allow the end user to show or hid component of the information. The data cannot be edited within the document and must be edited at its source (i.e. the relevant section in UniPhi that it was originally created e.g. the risks, issues and contracts tabs). Template variables ensure that necessary data is automatically populated when templates are used to create documents.

Template Management

The Templates management system is found under the UniPhi Methodology system.











When you click onto the Templates tab you will notice that in the upper right side there is a panel that highlights Recently Used Templates.



This panel is designed to inform a UniPhi user of the templates that they have recently used. Theoretically the user will use similar templates when creating documents on a regular basis, hence

they don't need to search for a specific template from a potentially long list of templates, as then can simply select the template they need from those that have been recently used.

At the very bottom of the screen below the Templates panel is the Template Categories panel.



Template Categories				
Template Category	Sector	Project Type	Service Line	Location
Contract Admin			Project Management	 
Design & Construction Review			Independent Verification, Superintendent	 
Drawings		New Build		 
Financial Management				 

Template categories are a useful way to limit, or contextualise the templates that your users will be presented with in UniPhi. In the example above you can see that several template categories have been associated with defined sectors, project types, service lines, and locations.





Adding a New Category

1. In the Template Categories panel click the  icon. The new Category field will appear



Template Categories				
Category				
<hr/>				
Sector	Project Type	Service Line	Location	
No Selection ▼	No Selection ▼	No Selection ▼	No Selection ▼	
<hr/>				
				

2. Type the name of the new category. If the templates that will be assigned to this template category are intended for use by all users, then you can leave all project specific information blank. No selection means the category is available to all users. Alternatively, if you wish to limit the category of templates to a specific group, you may make a selection at each of the project specific drop down selections.

3. Click on the  icon to save your changes or click the  icon if you make a mistake.

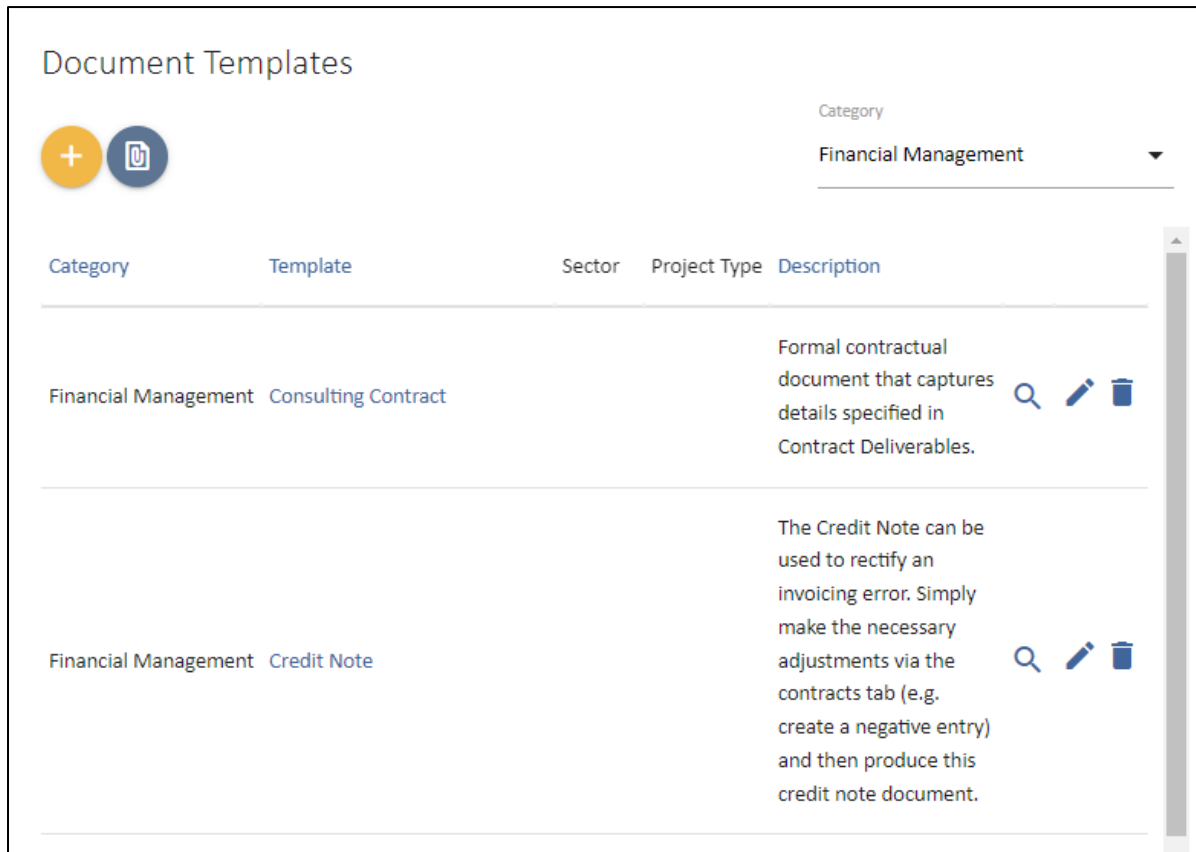
4. The new category will appear in the Template Category list.





At the far right hand of the Template Category list are the icons to Edit or Delete an existing category.   Pressing the edit icon will open up all of the selectable fields and allow you to make your changes. Pressing the delete icon will allow you delete any unwanted categories.




Available Templates

The Methodology Templates panel provides a list of all the templates which have been created in UniPhi. The defaults that are included with a new installation of UniPhi are designed to simply provide examples of template concepts that may be created.



The listing shows all the Templates in the system according to the selected Financial Management category filter.

The   icons in the upper left corner of the panel allow you to create a new templates.

The    icons to the right of each template in the list provide you to View, Edit, and Delete your templates. The View icon loads a summary of the steps or sections of the template as an overview of what it includes.

Consulting Contract

Formal contractual document that captures details specified in Contract Deliverables.

Created By	Created At	Sign On Behalf Of	Min Access Required to View
Jo Bloggs	16 Aug 2018 12:16	Yes	Team Member

PDF Stylesheet	Paper Size	OnSite Compatible
Coversheet	A4	No

Template Category
Financial Management

Template Steps

[Terms and Conditions](#)
[Contract Deliverables](#)
[Related Documents](#)
[Distribution](#)

Terms and Conditions

The terms and conditions of the contract

Input Object Type	Page Orientation	Page Break	Default Visibility
Textbox (Rich)	Portrait	None	Visible


This Services Agreement dated \$date.today


This is opened in a new browser tab or window and can be closed to return to the template list.

A deleted Template is not recoverable although any documents created using the template will remain intact.

Creating a Template

UniPhi features two types of template. The first and most valuable in terms of efficiencies and

traceability is the UniPhi template . UniPhi templates make use of the predefined and configurable template controls which have been designed to draw information that is stored within UniPhi, into a document format.

The second type of template available through UniPhi is the MS Word template . MS Word templates are basically formatted documents that have been saved into UniPhi's documents module, which are then available to users of UniPhi. MS Word templates do not have any functionality to allow for information to be drawn from data stored in UniPhi. Documents produced using MS Word templates are also not able to be searched or filtered through the Documents tab. For these reasons, templates using the MS Word format are best suited to reference materials, or standard text documents where the contents have been defined and does not change.



Adding a MS Word Template

1. From the Methodology / Templates tab, press the Add MS Word Template button.
2. Enter a title for your template, add a description that will assist your users to understand when and why the document will be used, and specify the template category (if necessary)

Document Templates

Word Template Name

Template Category

None ▼

Word Template Description

Sector

No Selection ▼

Project Type

No Selection ▼

Service Line

No Selection ▼

Location

No Selection ▼

Project Phase

No Selection ▼

3. Finally, attach the required file and then save your changes.

UniPhi Templates

UniPhi templates are a much more efficient way to create documents based on information stored within UniPhi. UniPhi template settings are found in the Methodology / Templates tab. Here you may press the Add icon to create a new template or the edit icon to edit an existing template

Note that the screen consists of three panels:

- New Template
- Document Edit Roles
- Document Signoff Roles

Document Edit Roles

To allow users from any role to create and edit documents, leave all edit roles blank.

Administrator

Construction Reviewers Manager

Project Verifiers Representative

Program Manager

Construction Reviewer

Contract Administrator

Cost Manager

Document Edit Roles

The Document Edit roles in the upper right side provides for controlling which team members in a project can Create a new document using this template.

As noted at the top of the panel

“To allow users from any role to create and edit documents, leave all edit roles blank.”

The purpose is to assist with managing documentation on projects by ensuring that members of the team only see templates that are relevant to their role on the project. This method is useful where restrictions need to be placed on access to certain documents.

Tick the role or roles as appropriate.

Document Signoff Roles

Enable Sign-On Behalf Of

No. Signatories Required _____

To allow the document creator to sign off documents, leave all signoff roles blank.

Administrator

Construction Reviewers Manager

Project Verifiers Representative

Program Manager

Construction Reviewer

Contract Administrator

Document Sign off Roles

The Document Sign-Off Roles panel allows for setting the desired authorisation or workflow for documents that will be created with this template.

The option to “Enable Sign-On Behalf Of” is enabled by default and allows for anyone to authorise a document in the absence of the preferred role.

The Roles are grouped by the Licence group allocated in the Methodology Roles section of UniPhi.

Document Signoff Roles

Enable Sign-On Behalf Of

No. Signatories Required _____

To allow the document creator to sign off documents, leave all signoff roles blank.

Administrator

Construction Reviewers Manager

Project Verifiers Representative

Program Manager

Construction Reviewer

Contract Administrator

Delegation



Found at the end of the template creation wizard. This feature enables specific Roles to be selected as the sign-off roles. UniPhi also allows delegation sign-off based on specified monetary values. In the scenario below, the Construction Reviewer is only authorised to sign-off on documents which have a budget value of up to \$50,000.

The Project Director however, will be required to sign-off all documents that have a value greater than \$50,001.

New Template

New Template

Template Name

Template Description

Minimum Access Required to View Documents OnSite Compatible

Team Member

Sector Project Type Service Line Location

No Selection No Selection No Selection No Selection

Project Phase Standard Template Category

No Selection No Selection None

Paper Size PDF Style PDF Options

A4 Coversheet

Email View

Team List ▼



The template creation process consists of three primary stages. This first stage of the template creation process generates the control and meta functions of the template. The second stage is to create the data entry steps in the template and the final stage provides for modifying the output order of the steps.

Template Configuration Details

The template configuration panel provides for the meta data and control characteristics of the template and its resulting documents.

Template Name

The template name field should be descriptive and concise. This value will be displayed in the drop down list for template selection in the Create New Document wizard. It will be the default document title for any document created using the template. Some special characters cannot be used within a in template name.

Template Description

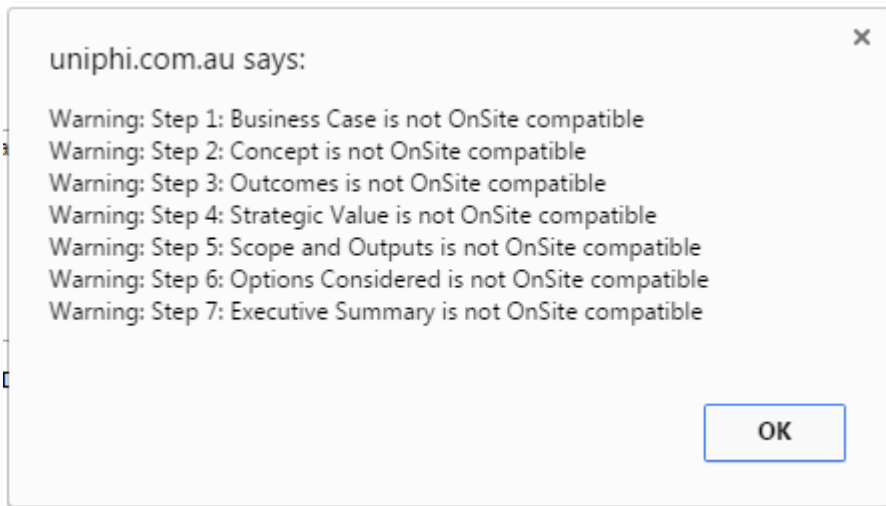
The template description is a longer description which provides the opportunity to instruct users on the appropriate use of the template. This description only appears in the Template Listing.

Minimum Access Requirements to View Documents

The licence level of a user is distinct from their role allocation levels in UniPhi. The primary purpose of this setting is to restrict Team Member access to documents that contain information that would not be accessible to them on screen, i.e. Costs, Fees, Contracts, etc. This defaults to Team Member.

OnSite Compatible

“OnSite” is the UniPhi mobile app (for iOS tablets, and Android devices). The OnSite compatible controls are a subset of the UniPhi controls. It is important to note that not all template controls are compatible with the mobile devices. If you are creating a new template specifically for use on a mobile device, you must tick the OnSite Compatible button. If you would like to use an existing template on your mobile devices, ticking the OnSite Compatible box will perform a quick test and inform you of any incompatible steps.



Project Specifics

As administrator you may choose to define the various project specific information filters. Defining your organisations Sector, Project Type, Service Line, Location, and Project Phases will allow you to allocate particular templates to specific organisational or according to project criteria. By default, your template will be available across all projects.

Project phase

This field is used to assign a template to a specific phase of a project. The purpose is to assist the user in understanding when a template would be used.

Template Category

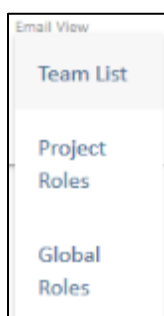
The template category selection includes the template in that category. Leave this as "None" unless a specific category is required. The template will appear in the template selection lists or the document creation wizard by default in the "All" category selection or the specific category if the list is filtered.

Default Style sheet

The default style sheet sets the selection as the default format for the output all documents created with the template. This can be overridden at document creation or when preparing document output.

Email View

The Email View option selects the default setting when email a document based on the template.

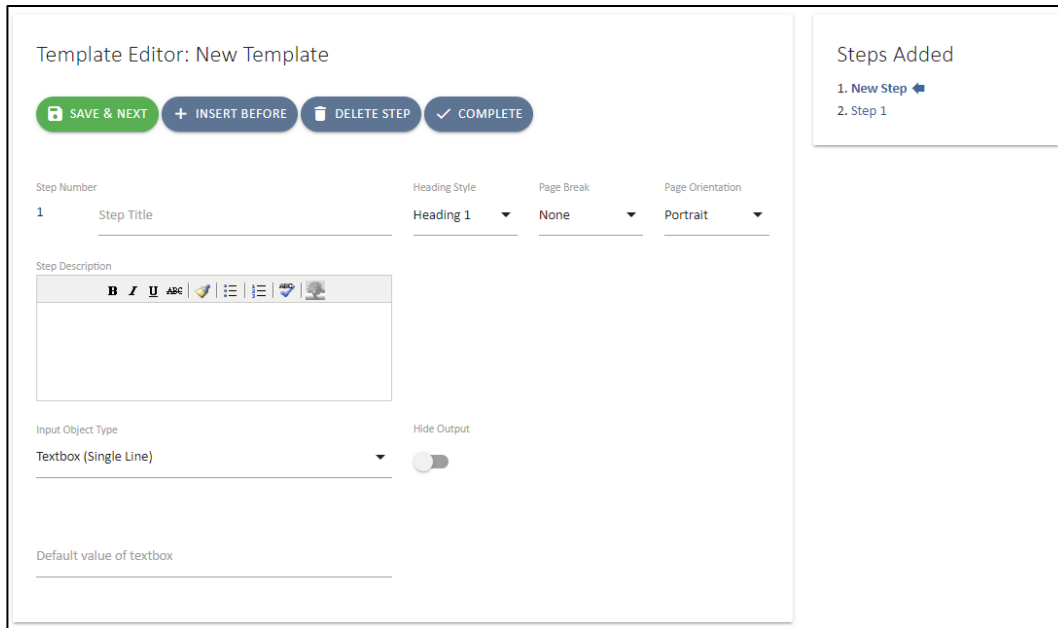


The View list options are:

- Team List: The Resources associated with the project listed by Name
- Project Roles: The Resources associated with the project grouped by Role
- Global Roles: All Resources from all projects in UniPhi grouped by Role.

Template Data Entry Details

Once the Template configuration details are completed the next stage is the addition of the data entry steps for the template.



The screen consists of two panels that mimic the format of the document preparation screens with the main Template Editor panel to the left and the Steps Added listing to the right.



The four main controls provide the following functions:

- Insert Before: Inserts a new step before the current step.
- Save & Next: Saves the current step
- Delete Step: Allows a single step to be deleted
- Complete: Finishes with the current step and moves to the final stage of a template.

Steps can be added at any time and will appear in the sequence that is nominated by using the Insert Before or Save & Next controls within the sequence of existing steps.

The main panel presents the following controls:

Step Number

This is a display only value that just confirms which is the currently edited step within the template.





Step Title

The Step Title is a single line field that will be presented as the step heading in the resulting documents. The title can be edited or overridden in the resulting output document.

The presentation format of the title is controlled by the Heading Style option.

Step Description

The purpose of the step description is to assist the document author using this template with an explanation of what is expected in terms of data or action.

Step Number	Step Title	Heading Style	Page Break	Page Orientation
1	Executive Summary	Heading 1	None	Portrait
Step Description				
<div style="border: 1px solid gray; padding: 5px;"> <p>B <i>I</i> <u>U</u> ABC | | | | </p> <p>Executive Summary allows you to provide the full details relating to the cost plan for your project</p> </div>				

In this example the recommendation is that the rest of the document is completed and understood before the Executive Summary is prepared.

In a resulting document this appears as un-editable text to prompt the author with this instruction.

Executive Summary

The Executive Summary screen allows you to provide the full details relating to the cost plan for your project

Page Orientation	Page Break	Hide Output
Portrait	None	<input type="checkbox"/>

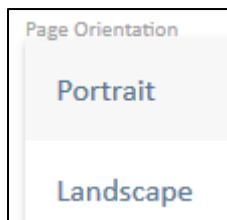
Step Title

Executive Summary

Note that the Step Title is an editable field so it can be modified for the resulting output document.

Page Orientation

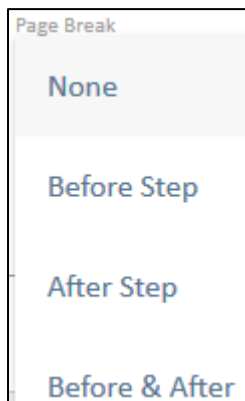
This sets the default page orientation as either Portrait or Landscape. However, it is not until preparing the data with the document that the page width will be known. Select either Portrait or Landscape orientation.



As a result this can be overridden during document preparation but is useful to select landscape if the content of the step is expected to be wider than a portrait page.

Page Break

Controlling the pages of a document will vary depending on the content. This control allows for default settings, which can also be overridden during document preparation.



Select a page break Before, After, or both 'Before & After' the document step. Adding a Page Break After a step and adding a Page Break Before the next step will insert two breaks and therefore a blank page is inserted into the resulting document.



Page Breaks will also occur automatically in documents depending on the volume of data in a particular step. For example a long Issues list may split across multiple pages. Also the Rich Text Editor provides for inserting Page Breaks directly into text based information.

Heading Style

The heading style selection allows for three heading formats, a paragraph, and an option for no heading to be displayed. The output format of each of these options will be set in the style sheet according to the style guide information. The defined heading is not editable by your document authors, and the purpose is to ensure consistency in document presentation standards.

Heading Style
Heading 1
Heading 2
Heading 3
Paragraph
None

Select:

- Heading 1, Heading 2, or Heading 3 for special text formatting according to the style guide.
- Paragraph to use the same font and style as the normal text except that the 'heading' will appear on its' own line with a separate line before and after the heading text.
- None to have no heading appear for the step.

Hide Output

Hiding the output of a step relates to the output document not to the editing process. The step is still active and presented during the document editing sequence.

The purpose is to allow for a default setting that can be overridden during document preparation.

As an example 'Related Attachments' steps may be used within a template where there is requirements to add a related file (or files) to the document.

Related Attachments

No files attached

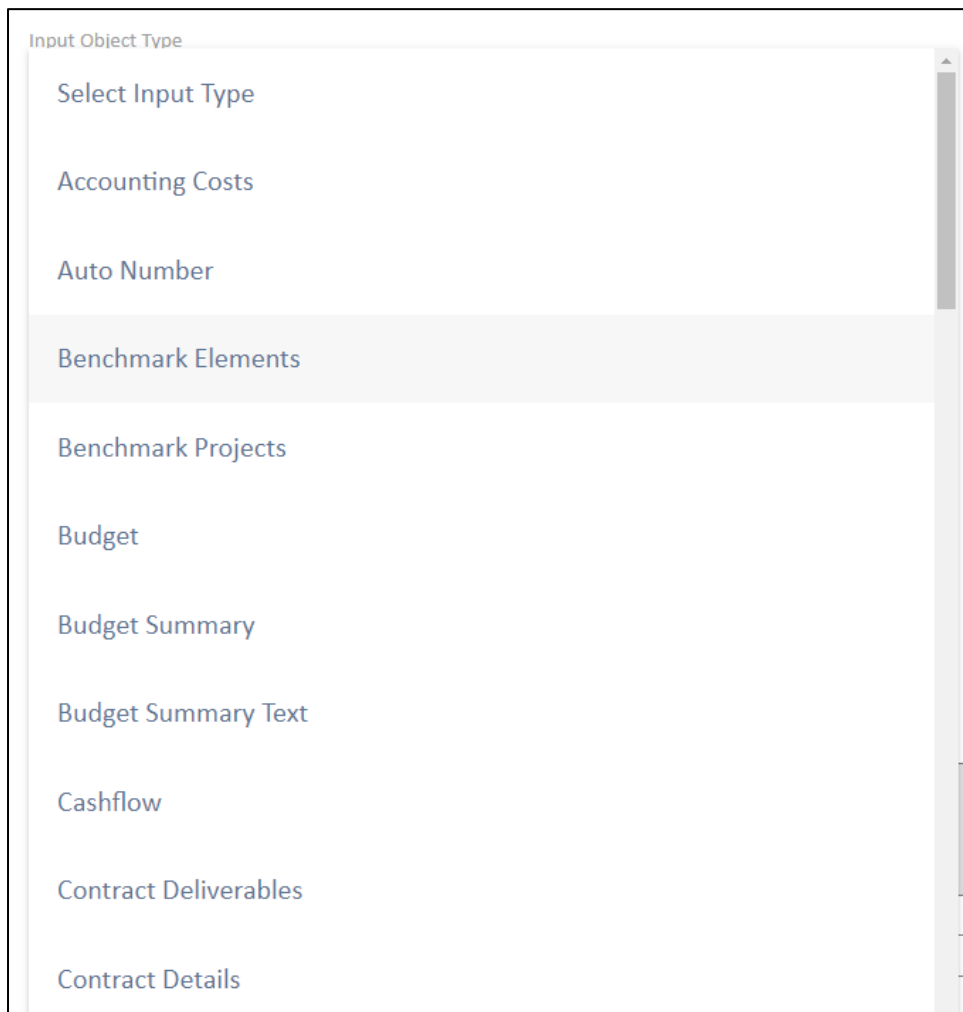
Selecting the hide output option will remove the entire step from your output document, This may be useful where you don't wish to attach a document. If however you do attach a file you can untick the hide output option, and your files will appear within your output document.

Input Object Types

The array of input object types is broad and they are designed to cater for a flexible and versatile process integrating any project or portfolio information that is accessible within the UniPhi system.

The Appendix of this manual covers each of the Input Object types and describes in detail and expands on the source of the data and control of the presentation to a document author using the template.

The following page provides a simple example of a template input object for the purpose of explaining how a template is created.



Clicking on the selector option for the Input Object Type presents a list of available options.





The Rich Text Editor is commonly used as it has the ability to link, or import specific database details into the boilerplate text as well as images and tables.

When that is loaded it will display an empty text box which can then be populated with required text that will appear in the resulting document where it can be edited or changed as required for the document output.

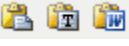
Input Object Type Hide Output

Textbox (Single Line) ▼


Default value of textbox

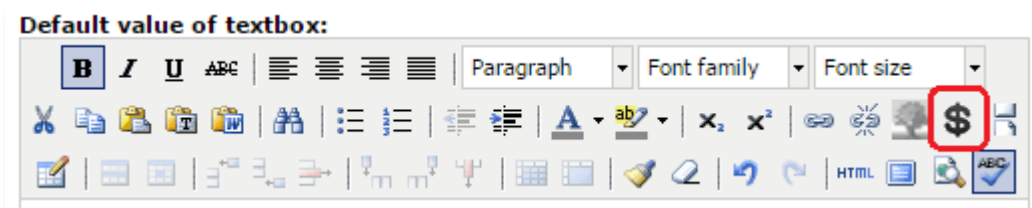
Once completed this step can be saved with the  icon or  to save and move to the finish step.



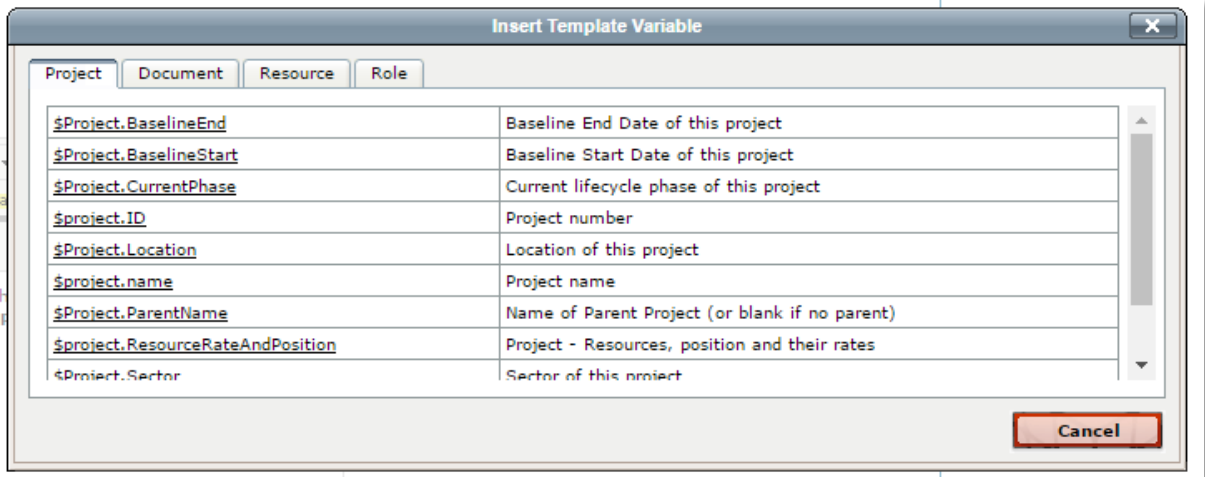
When using copy and paste from Microsoft Word or other systems, it is best to use the “paste from” icons  for normal paste, paste text only, or paste from Word. The paste from Word will strip all the Word specific formatting from the pasted information so that it does not conflict with the styles in the output document.

Template Variables

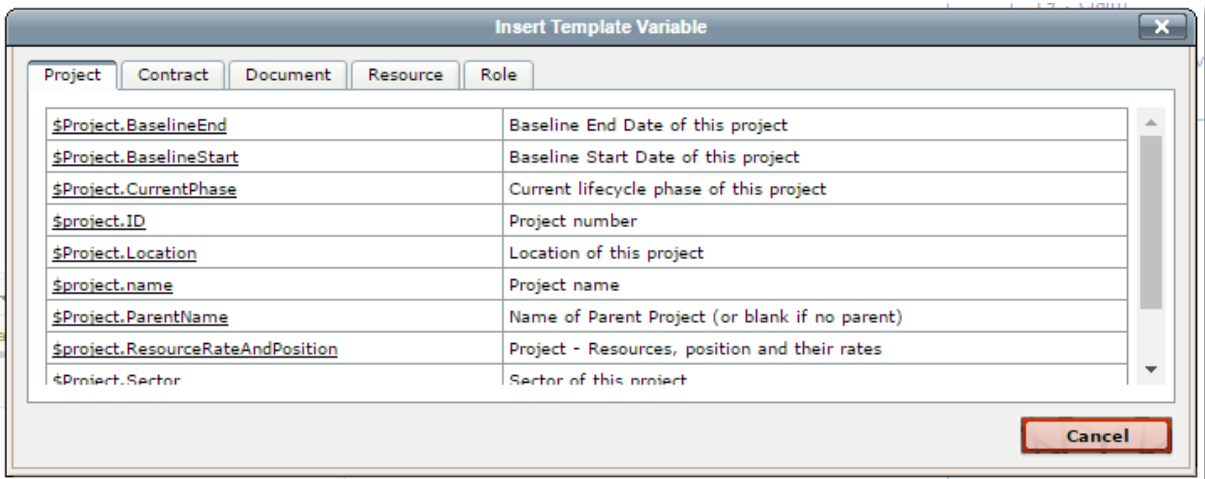
Template Variables can be inserted from the toolbar control  or by manually typing or copy and paste from the Admin -> Template Variables list.



Selecting the toolbar icon will present a pop-up dialog

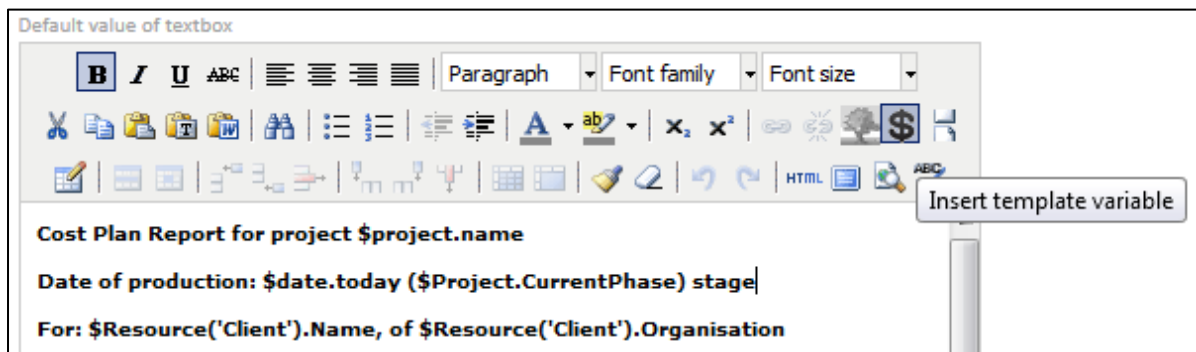


The popup screen allows for selecting template variables. By default Project, Document, Resource, and Role are displayed. If specific template input objects are included in the template, then additional template variables will be made available. For example the Contract variables are not relevant unless a contract input object is a step in the template as the system would not know which contract to reference.



In the second screen the Contract variables are included.

Once a variable is selected from the pop-up window the \$variable will appear in the text box.



In this example several template variables; \$date.today, and \$project.name have been inserted into the text.

When this Rich Text object is used in the template the details are pulled from the relevant project in UniPhi and inserted as text, or numbers.

Administrators of UniPhi can access the Template Variables listing in UniPhi under the *Configuration*

Template Variables				
Variable Name	Description	Scope	Output Type	Query
\$AccountCode('Cost Code').TotalVariance	Variance Total of account code in this project	Chart of Accounts	Single Item	accountCode = @accountCode SELECT @totalForecast = ISNULL(itemPending, 0) + ISNULL(itemPossibleVariation, 0) + ISNULL(itemPendingVariation, 0) + ISNULL(itemForecastToComplete, 0) + ISNULL(itemCommitted, 0) + ISNULL(itemRemContingency, 0) FROM tblBudget WHERE macroID = @macroID AND codeID = @codeID SELECT @originalBudget = ISNULL(bs.itemBudget, 0) FROM tblBudgetSnapshot bs INNER JOIN (SELECT versionID = MAX(versionID) FROM tblBudgetVersion WHERE (isOriginal = 1) AND (chartID = @chartID) AND (macroID = @macroID)) bv ON bs.versionID = bv.versionID WHERE bs.codeID = @codeID SELECT CONVERT(VARCHAR, ISNULL(@originalBudget, 0) - ISNULL(@totalForecast, 0), 1)
\$AccountCode('Cost Code').Transfer	Budget Transfers Total of account code in this project	Chart of Accounts	Single Item	DECLARE @chartID INT, @codeID INT, @itemBudget MONEY, @originalBudget MONEY SELECT @chartID = chartID FROM tblCostCharts WHERE chartDsc = @chartDsc SELECT @codeID = codeID FROM tblCostCodes WHERE chartID = @chartID AND accountCode = @accountCode SELECT @itemBudget = bs.itemBudget FROM tblBudgetSnapshot bs INNER JOIN (SELECT versionID = MAX(versionID) FROM tblBudgetVersion WHERE (isApproved = 1) AND (chartID = @chartID) AND (macroID = @macroID)) bv ON bs.versionID = bv.versionID WHERE bs.codeID = @codeID SELECT @originalBudget = bs.itemBudget FROM tblBudgetSnapshot bs INNER JOIN (SELECT versionID = MAX(versionID) FROM tblBudgetVersion WHERE (isOriginal = 1) AND (chartID = @chartID) AND (macroID = @macroID)) bv ON bs.versionID = bv.versionID WHERE bs.codeID = @codeID SELECT CONVERT(VARCHAR, ISNULL(@itemBudget, 0) - ISNULL(@originalBudget, 0), 1)
\$AccountCode('Cost Code').Untendered	Untendered Total of account code in this project	Chart of Accounts	Single Item	DECLARE @chartID INT, @codeID INT, @itemForecastToComplete MONEY SELECT @chartID = chartID FROM tblCostCharts WHERE chartDsc = @chartDsc SELECT @codeID = codeID FROM tblCostCodes WHERE chartID = @chartID AND accountCode = @accountCode SELECT @itemForecastToComplete = itemForecastToComplete FROM tblBudget WHERE macroID = @macroID AND codeID = @codeID SELECT CONVERT(VARCHAR, ISNULL(@itemForecastToComplete, 0), 1)
\$Contract.AdjustedCompletionDate	Contract adjusted completion date	Contract	Single Item	SELECT CONVERT(varchar, adjustedCompletionDate, 106) FROM tblContracts WHERE contractID = @contractID
\$Contract.AdjustedValue	Adjusted contract value (excluding tax)	Contract	Single Item	SELECT CONVERT(varchar, originalValue + variationValue, 1) FROM tblContracts WHERE contractID = @contractID

> *Template Variables* module.

A Template Variable is a standard piece of SQL code that extracts information from the UniPhi database according to the relevant project.

Template Output Order

The final stage of creating a template is to sequence the output order of the document. If your template features numerous steps, it is possible to re-order the output so that it appears in a different sequence to the input order.

Step Order: Executive Summary 2

✓ FINISH

Input	Step	Output
1	Existing Report	<u>14</u>
2	Changes from previous plan	<u>1</u>
3	Commentary on changes	<u>2</u>
4	Inclusions, Exclusions and Notes	<u>3</u>
5	Executive Summary	<u>4</u>

To modify the output order, edit the Output column fields with the appropriate numbers. The output order does not need to be the same as the input order. There is the possibility to prepare information like a value in a step that is then used in a later step in the input sequence.

Save your entry once you have sorted the Output order.



























Create a Simple UniPhi Template

To create a basic template:

1. Click in the *Methodology > Templates* tab. The *Document Templates* view will be displayed. This lists any templates already created and gives a brief description:

Document Templates

Category	Template	Sector	Project Type	Service Line	Location	Phase	Description	
	?							  
	><							  
	Accounting Costs							  
RFI	Architect Instructions							  
Contract Admin	Balancing Claim							  
	Benchmarking							  
	Budget						This is used to approve the budget	  
	Budget Change Request							  

2. Click on the  icon. The *New Template* view will be displayed:

New Template

Template Name

Template Description

Minimum Access Required to View Documents OnSite Compatible

Team Member

Sector Project Type Service Line Location

No Selection No Selection No Selection No Selection

Project Phase Standard Template Category

No Selection No Selection None

Paper Size PDF Style PDF Options

A4 Coversheet

Email View

Team List

3. Enter a descriptive name for the new template. The template name field should be descriptive and concise. This value will be displayed in the drop down list for template selection in the Create New Document wizard. It will be the default document title for any document created using the template. Some special characters cannot be used within a in template name. Special characters commonly include: \ / : * ? " < > |
4. Enter a more detailed description for the template. This information will be displayed in the *Document Templates* view and will assist users to understand the templates intended usage and purpose.
5. Select the accessibility of this template by choosing from the drop down menu. This is a restrictive hierarchy control. Where a team member is specified as the minimum level, then every licenced user may use the template and view the output documents. While a minimum access level of Administrator would restrict use of the template and visibility of output document to Admin licenced users only.

6. If this template is to be used remotely on mobile devices via the OnSite app, tick the OnSite compatibility checkbox.
7. Choose from the dropdown menus the *Sector, Project Type, Service Line, Location and Project Phase*. Adding a tickbox next to any of these organisational custom categories will restrict the use of your template to only those projects which fit into your specified criteria. This is intended to reduce the number of templates that are presented to your end users (e.g. if your organisation spans various regions, you may establish regional templates and link each one to a particular location)
8. The *Default Stylesheet* filter allows you to specify what style the output document will adopt. Your deployment may have several defined style sheets such as coversheet, or letterhead.



Stylesheets: UniPhi programmers can apply customised stylesheets, which are specific to your organisations requirements. This may include adding your organisation’s standard letterhead, or coversheet design, for example.

9. Tick or un-tick the *Signatures, Comments, Transmittal and Watermark* boxes depending on whether you do or do not want these features to appear on output documents.

Paper Size	PDF Style	PDF Options
A4	Coversheet	<input type="checkbox"/> Signatures
Email View		<input type="checkbox"/> Comments
Team List		<input type="checkbox"/> Transmittal
		<input type="checkbox"/> Watermark



Signatures: displays who has signed the document off

Comments: displays comments made regarding the document – usually while in draft format

Transmittal: displays who the document has been emailed to, and when

Watermark: displays a “DRAFT” watermark on the document when rendered.

10. Select the Email View List. This is a list of resources on the project that will appear when the document email view is selected.
11. Select the required paper size from the dropdown menu.



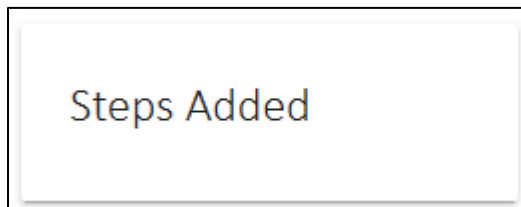
12. After indicating the phase, stylesheet, edit and signoff roles, click the icon:

13. Enter a *Step Title* for the first step of your template:

<input type="text" value="Step Title"/>	Heading Style Heading 1 ▼
---	------------------------------



Template Steps and the Checklist: UniPhi templates are made up of *Steps* that the user must complete (called the *Checklist*) to create the final document. Each step in the checklist represents a document control (see below) and needs to be selected in order to import the data and to save the information. This information will then be displayed within the final document .



Note that the *Steps Added* box is empty as no steps have been added to the template yet. As steps are added and saved, each step title will appear in the *Steps Added* panel. This is a useful reference when creating your template, but also as a navigation aid when you are creating a document from the template, as you can jump straight to a specific step as opposed to having to save and continue through the whole document.

Document Controls / Input Objects are created by UniPhi software developers as an integral part of the document management system. They enable quick creation of documentation based on information that has already been entered into UniPhi.

Example Document Controls:

The *Textbox (Rich)* document control appears in most templates. By using this control the user can enter unlimited text, tables and graphics into their document. Default text can also be entered by the template creator / administrator and will be displayed, and can be edited or deleted by the user.

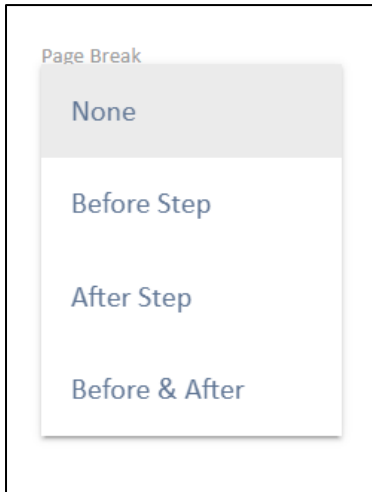
A *Contract Details* control can be configured to let the user specify which contract the document refers to as projects can have multiple contracts. This method is used to make information from the selected contract available for use in the document you are creating. Information from that contract can be populated throughout the document by using *Template Variables*. Template variables will be outlined in more detail later in this manual.

A full list of document controls can be found in the appendix of this document.

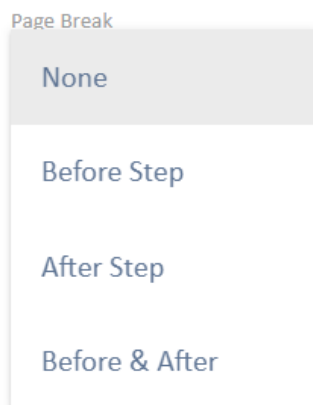
14. Enter a description for the template step. This is where you can add instructions to your end users on how to fill a template in:



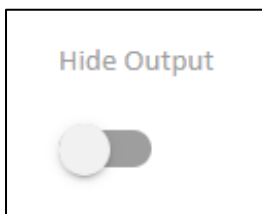
15. The *Page Break* drop down allows you to indicate if you want the following/previous step to appear on a different page. This is useful when the output orientation of a page differs from those that precede or follow (e.g. a landscape page that follows a portrait page):



16. The *Heading Style*: drop down allows you to select the format of the step. Select *Heading 1, 2* or *3* for the *Step Title* to appear as a heading in the document or select *Paragraph* for it to appear as normal text. Select *None* if you do not wish the *Step Title* to appear in the final document.



17. Tick or un-tick the *Hide Output* tick box if you do or do not want the step hidden:



Hide Output: When setting up a template it may be necessary to include steps that you wish to be hidden in the final document. For example, you may want to include

a *Date Selector* input object so that you can insert that date throughout the document (through the use of template variables) but do not want the date to appear where that step appears in the checklist. Users of the template have the option to unhide steps and hide steps.

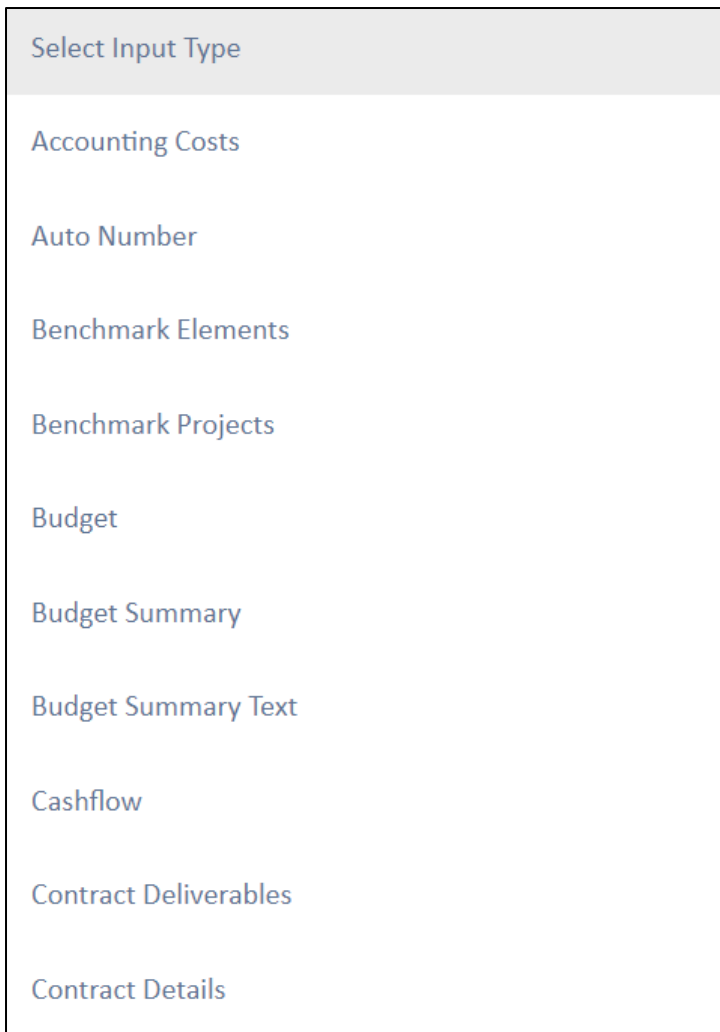
When setting up templates, System Administrators are establishing default settings that the user can amend if required. Users also have the option to change page breaks set by the administrator and standard text entered into text boxes.

18. Next select the *Input Object Type* (or Document Control) for this step of your template:



The image shows a dropdown menu with the title "Input Object Type" and the current selection "Select Input Type". A small downward-pointing triangle is visible on the right side of the menu.

There is an ever growing list of Objects you can choose from. Scroll through the list and select the required object for this step of your template:



The image shows a list of objects available for selection in the dropdown menu. The list items are: Accounting Costs, Auto Number, Benchmark Elements, Benchmark Projects, Budget, Budget Summary, Budget Summary Text, Cashflow, Contract Deliverables, and Contract Details.

For this example, select the Date Selector Input Object Type:

Template Editor: Sample Template

SAVE & NEXT
INSERT BEFORE
COMPLETE

Step Number	Step Title	Heading Style	Page Break	Page Orientation
1	Date Selector	Heading 1	None	Portrait

Step Description

B *I* U ABC | | | |

Input Object Type: Date Selector Hide Output

Date Format: 10/10/2023

19. This object requires that you indicate the format of the date, as it will appear in the final document. Use the drop down to select the appropriate format:

Date Format

- 9/11/2023
- 2023-11-09
- 09 Nov 2023
- Nov 09 2023
- 09 November 2023
- Thursday, 9 November 2023

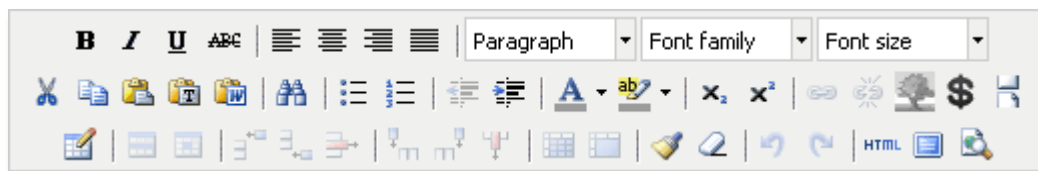
20. Click SAVE & NEXT to save your step and move Step number: 2:



You can leave the textbox empty, ready for the user to enter text, tables, graphics etc. or you can enter default text, format it using the rich text editor toolbar, so that it is there ready for the user to use and edit when creating a document from this template.

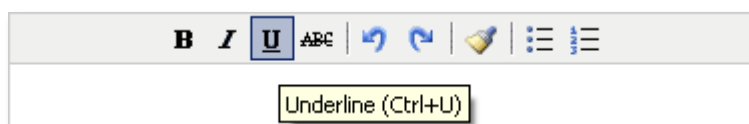
The Rich Text Editor Toolbar

The rich text toolbar, displayed below, is available to use with a rich text box and provides functionality for the HTML environment.





The multi line text editor toolbar uses a cut down version of this editor. Hover over an icon and a label will appear to tell you what the icon is. The Ctrl key and relevant letter on the keyboard can be used to activate some of the controls exactly the same as you would use in MS Word.

For example: Ctrl+C for copy, Ctrl+V for paste and Ctrl+Z for undo.



The common commands you will use are as follows:

 - highlight text to make formatting changes **B – to bold** , *I to turn to italic* or U for underline. Select the letter to either add or remove the formatting type. You can also use the common keyboard commands that you would use in MS Word such as Ctrl+B, Ctrl+I or Ctrl+U. The ABC enables you to strike through the text.

 - enables you to position text in the document to the left, right, centre or justified.



- select the heading style you wish to use if required, these have all been predefined for you. The heading styles and paragraph are Calibri. You can manually select font family and font size from the drop down if you wish.



- the cut, copy and paste icons enable you to add or remove text into the rich text box from external documents or sources.



- the paste as plain text icon is used when copying text from MS Word. This is because MS Word has its own markup language which does not match exactly with HTML. When copying text from MS Word the rich text editor does its best to convert from word to HTML, however it is not perfect since the two do not match up exactly. The paste as plain text option will remove the word formatting and allow the user to have more control with formatting.



- provides the options to create or remove a bulleted or numbered list. When you remove these a space will be entered between each line of text . If you wish to remove these spaces place your cursor in front of the first letter of the word you wish to move and select your backspace key. The word will be inline with the word previously above, now select Shift+Enter. The word will be placed back on the line immediately below with no bullets and the space is removed. Alternatively, if you are familiar with HTML you can view the code and make your changes there. (See [HTML](#) explanation further on in this section).



- enables you to change the colour of the font by highlighting the text and selecting the drop down menu to pick your colour.



- enables you to highlight the background of the text, this is particularly useful if you want to note where you have made changes in a document so the author or readers can see what you have amended in the text. UniPhi does not have a track changes option.



- Used to insert a picture and enables you to select the image you want to insert. This can be

used for inserting a photo into CV or logos etc . The best method is to create a table and insert the graphic into one cell, that way you can control the positioning.



- The first icon inserts a table into a rich text box and you can enter the number of rows and columns required.

The middle icon displays the table properties and where you modify the amount of rows and columns and set width and height properties. (Table width is suggested to be fixed to **650 pixels** so when document is rendered to PDF it will fit on an A4 page. Creating tables will be outlined in greater detail further on).

The last icon is the cell properties. It is suggested that you modify the cell/column using pixels with a total of all columns across the table equalling the table wide, usually the suggested **650 pixels**. For example a table with 5 columns may have a width of 130 pixels each, if you change one of the cells in a column you will need to update the remaining columns to maintain the table width



- Inserts a column in a table to the right or left or the last icon deletes a column. Place the cursor in the column you wish to insert next to or delete and select the relevant icon.



- Inserts a row in a table below or above the row you are in. Place the the cursor in the row you wish to insert a new row above or below or delete and select the relevent icon.



- redo/undo the last action(s) done. You can also use Ctrl+Z to undo or Ctrl+Y to redo.



- select this icon to access the HTML code for the step. If you are familiar with HTML you may find it easier to use the HTML view and make changes to the code to create your information, amend formatting.

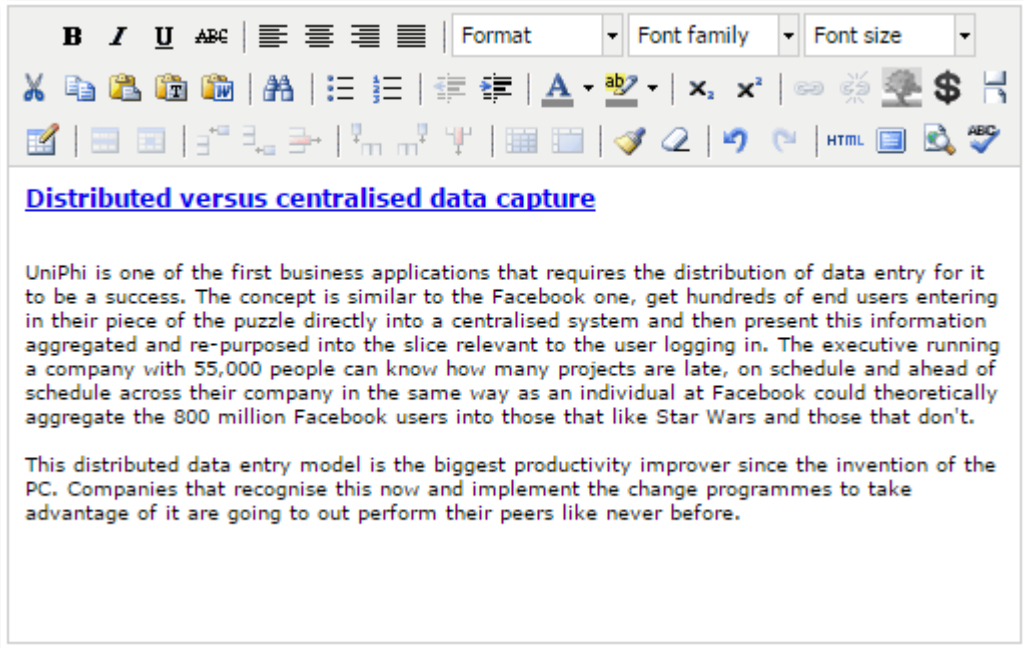


- enables you to view the full screen for the step you are in.



- enables you to indent text to the right or outdent to the left. You can use this method as well to remove bullets or numbers by selecting all the relevant text and then outdenting until gone.

22. Enter in text into the rich textbox, formatting as required using the editor buttons:



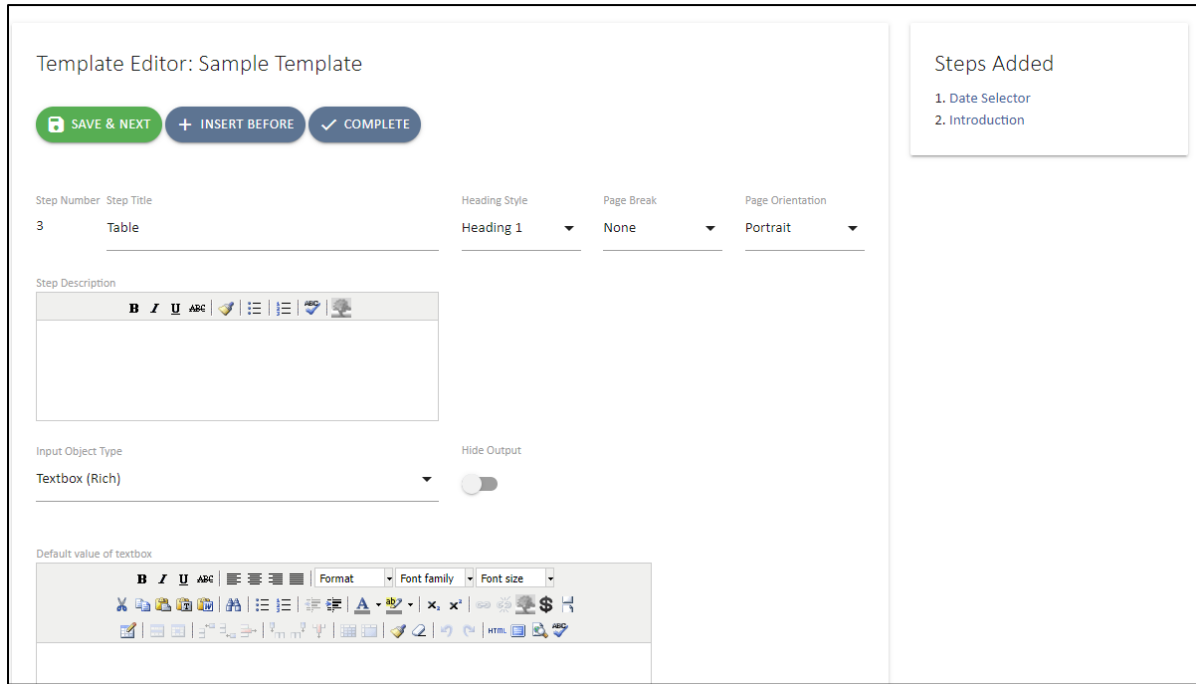
23. Save your entry.




+ INSERT BEFORE

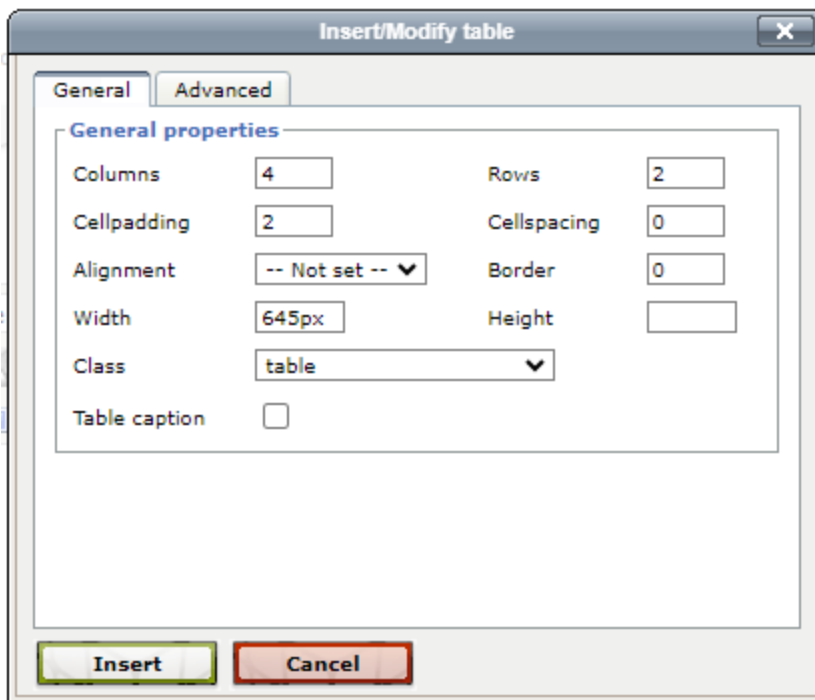
You can use the icon to amend the order of your steps and include a step you may have missed.

24. Repeat the process (enter a step title, step description, indicate if you require a page break, select how or if you want the title displayed, if you wish to hide the step):



For this step, add another *Textbox (Rich)* Input Object Type but this time, add a table and template variables. Template Variables will be explained further on when you go to add them to the table.

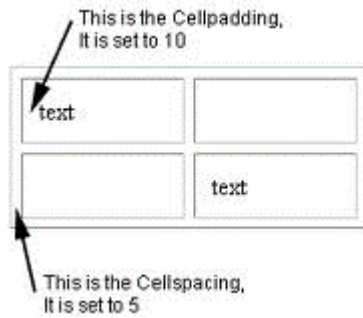
25. Insert a table by selecting the insert table  icon. Select 4 columns, 4 rows, 2 Cellpadding and a width of 650 in the dialog box that is displayed:





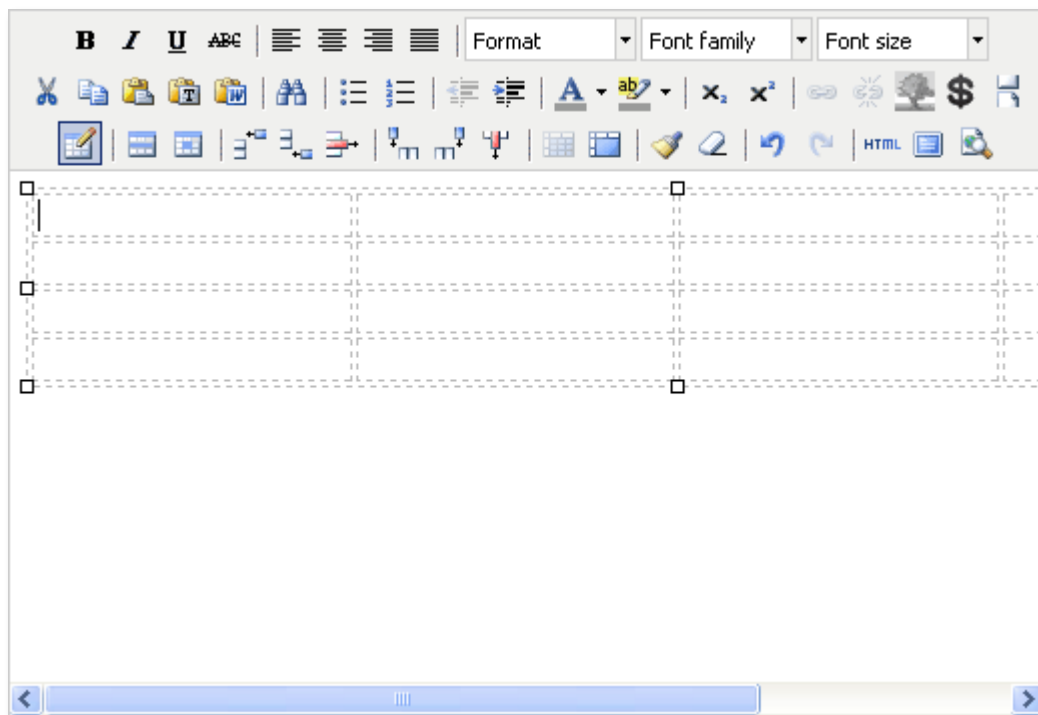
Cellpadding sets the amount of space between the contents of the cell and the cell wall. *Cellspacing* controls the space between table cells. *Cellpadding* is usually more effective than *cellspacing* for spreading out the contents of tables.


Example:

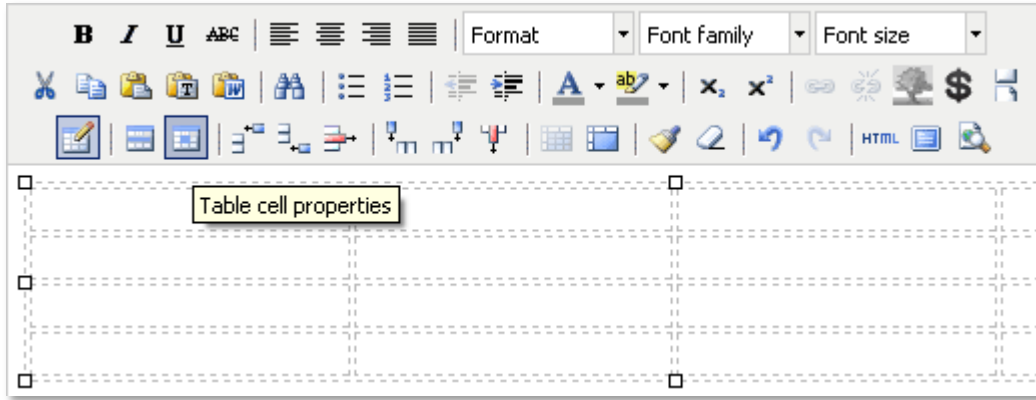


(Source: http://www.conservapedia.com/HTML_table_formatting)

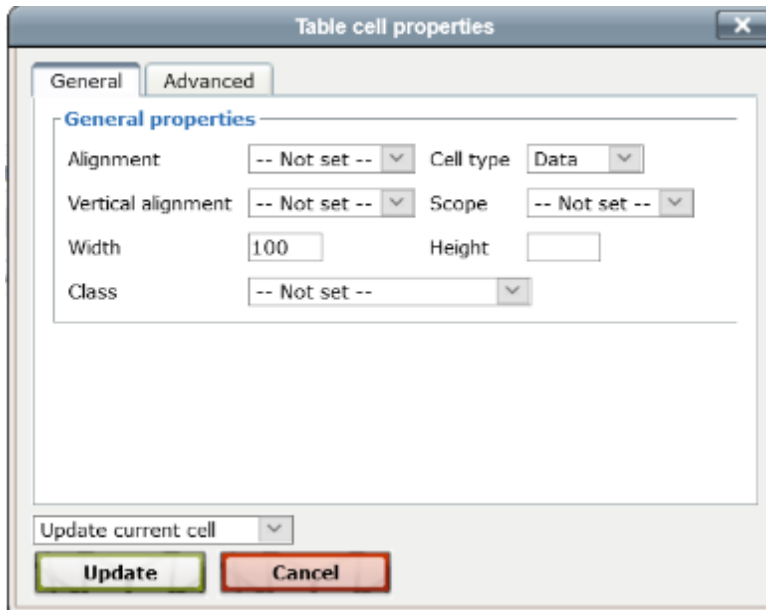
26. Select  to insert the table into the rich textbox:



27. Format the column width by selecting the top cell in the column and clicking on the  *Cell Properties* icon:



This will launch the *Table cell properties* dialogue box. Set the column *width* to 100, which is 100 pixels.

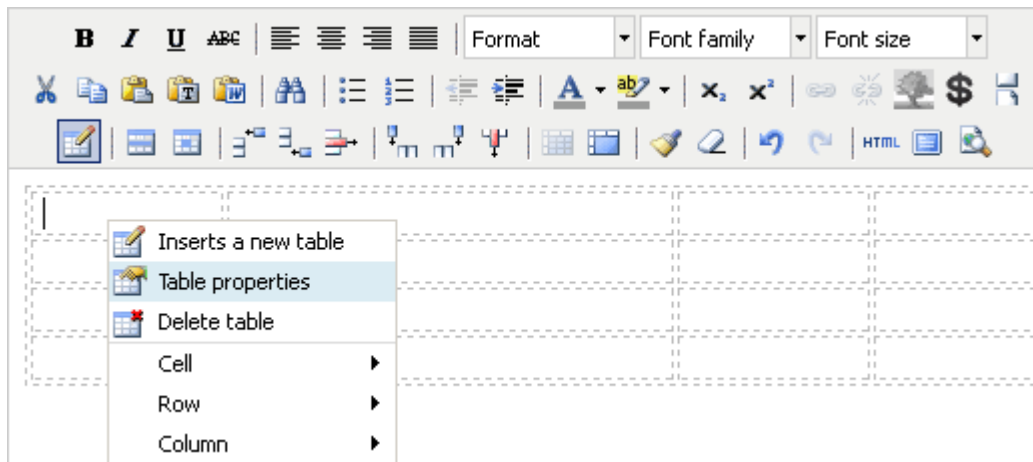


Column Widths: When setting the column widths, be sure to note the total table width in pixels and make each column a subset of this totalling the width of the table. For example, in the table we are creating the first column will be 100 pixels, the second 225 pixels, the third 100 pixels and the fourth 225 pixels totalling the table width of 650 pixels.

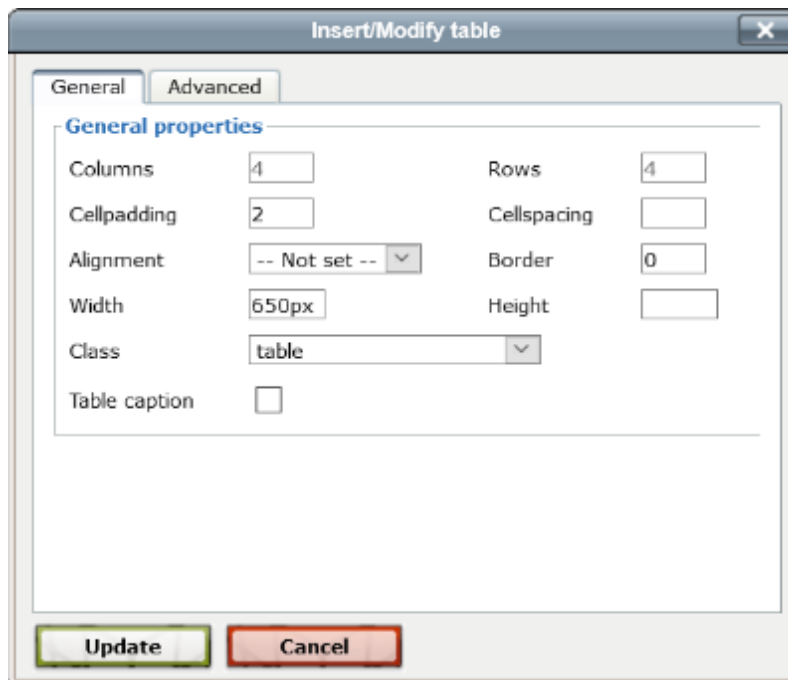
28. Repeat above steps to complete setting your column widths:



29. You can use the table as it is to space out the text and not have it appear as a table in the output document. Have your table format to your standard style, right mouse click and select *table properties*:



This will launch the *Insert/Modify table* window:

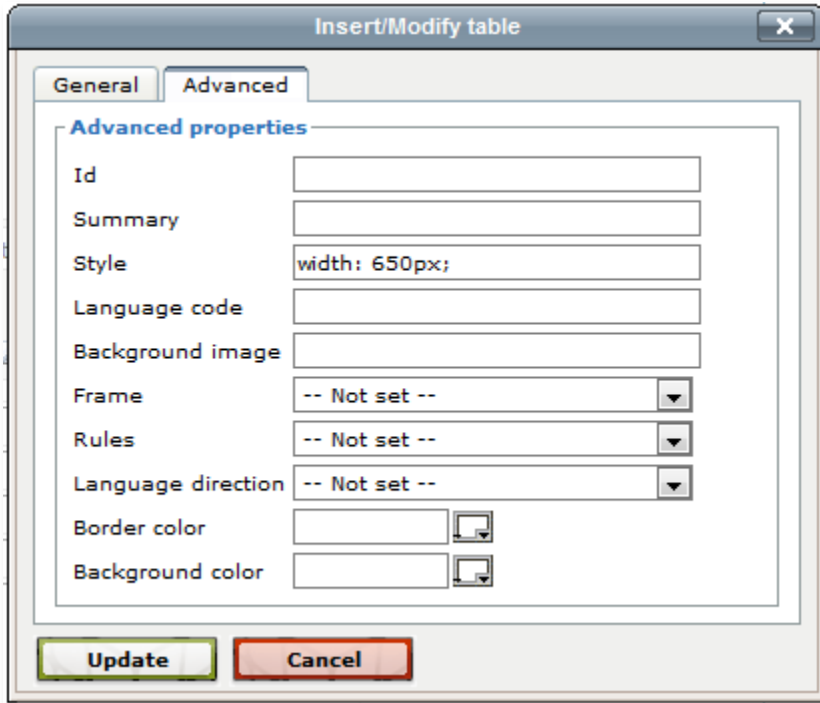




30. In the Class drop down list, select "table". This will apply your table style to the document when it is saves as a PDF.

31. Click  button:




Table Class means that you do not have to use advanced table setting to make your tables look consistent. Instead Let UniPhi apply the required formatting when the PDF is generated. This will ensure all the tables in your documents are consistent.



32. Click on the  [Save & Next](#) icon to move onto the next user control
33. Click on the  [Complete](#) icon to finish adding steps to your template.
34. You will be presented with the Step Order box:

Step Order: Sample Template



Input	Step	Output
1	Date Selector	2
2	Introduction	1
3	Table	3

This enables you to sort the order in which inputs are displayed, or output, in a document. For example, if you were stepping someone through how to enter a business case, you would get them to complete a variety of analysis first (e.g. situation analysis, SWOT analysis etc.), then they would enter the main document information and lastly they would write the executive summary. However, we would want this order reversed when displaying the document.

35. Decide which order you would like to display the document by amending the output order.
36. In Document Autaname use text and template variables to apply rules to generate the document name.

Document Autaname

Optionally you may use template variables to autogenerate a document name

\$

37. Specify any sign off roles, including any financial delegations of authority for your financial document (e.g. progress payment, or contracts)

Document Signoff Roles

✓ Enable Sign-On Behalf Of

To allow the document creator to sign off documents, leave all signoff roles blank.

CLEAR SELECTIONS

Administrator

Construction Reviewers Manager

Design Review Manager

Project Verifiers Representative

Program Manager

✓ Construction Reviewer

Delegation

Budget Value (Changes from previous plan) 50000
greater than

Budget Value (Appendix 1 - Full Cost Plan) 50000
greater than

Contract Administrator

✓ Project Director

Delegation

Budget Value (Changes from previous plan) less than
50001

Budget Value (Appendix 1 - Full Cost Plan) less than
50001

Found at the end of the template creation wizard. This feature enables specific Roles to be selected as the sign-off roles. UniPhi also allows delegation sign-off based on specified monetary values. In the scenario below, the Construction Reviewer is only authorised to sign-off on documents which have a budget value of up to \$50,000. The Project Director however, will be required to sign-off all documents that have a value greater than \$50,001.


38. Click on the  icon

You have successfully created a template



Template Variables

A template variable allows information that already exists within UniPhi to be automatically inserted into a document when it is created. For example, the name of a project may be inserted by using a variable such as `$Project.Name`, or the phone number of the project manager may be inserted by using a variable such as `$Resource('Project Manager').Phone`

Template variables are available when adding a rich text step to a template by clicking on the  icon. Certain variables that are project specific are always available, however others such as contract specific variables can only be inserted into a template if a contract had been selected in an earlier template step, such as when creating a contract variation.

Template variables are also available for Document Autaname.

Template variables are created in the *Admin > Template Variable* view. UniPhi software developers will create required template variables on your behalf.



Methodology

Methodology - the principles, process groups and business rules that make up the practice of the project management discipline.

Workflow - a collection of business processes, task definitions, actions/performance of tasks, which when followed allows a consistent and repeatable approach to a piece of work/tasks, process, processes or project in order to achieve a verifiable, auditable, consistent and reliable output. In this sense, the overarching series of steps to complete the project life cycle is the project workflow. Within this overarching workflow will be sub-sets of workflows to move through a particular phase.

Phase - A stage gate or section of a project lifecycle.

Input - A product or deliverable required to initiate a process

Process - a series of steps or actions that need to be performed to transform the inputs into the desired outputs.

Output - A tangible and verifiable product or deliverable required to mark the completion of a process

Business rules - the logic or decision that needs to be made during a process

Outcome - the result, achievements or effect of producing an output

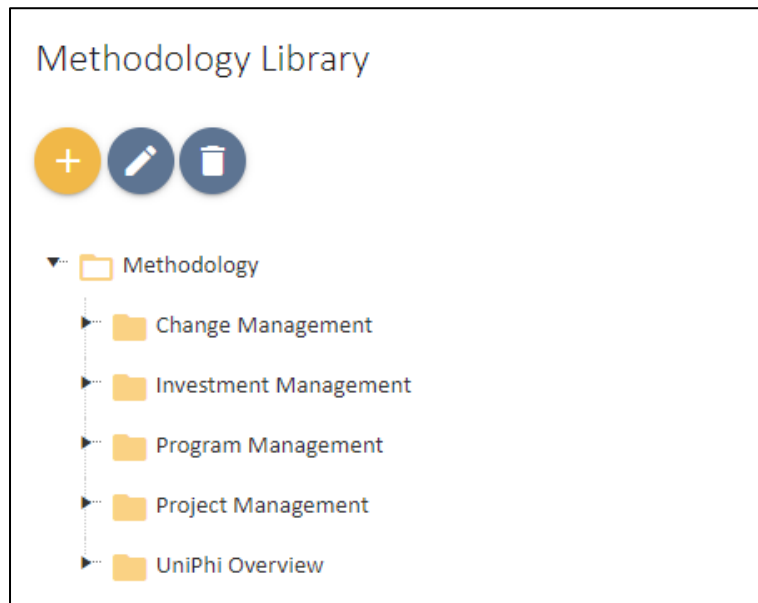
In UniPhi, a methodology library is created. The structure of this library is folders, flowcharts and library pages. Included within a library page is links to templates. Templates are a separate component of the system and will be covered later in the course.



Create and Edit Methodology Folders in the Library

To create a Folder:

1. Go to *Methodology > Library* tab.



2. Click on the Add toolbar icon 

3. You will see a drop down list with three content options; *Folder, Flowchart* and *Library Page*: Select *Folder*



4. Enter a title for your new *Folder*

5. Select 

6. Your new folder will appear at the end of the current folder list.

You have successfully added a folder

To edit a Folder:


1. Click on the folder you wish to edit

2. Select the  icon

3. You have three edit options; you can edit the name, move the folder up in position or move the folder down in position. To edit the name, double click on the folder name and type the new name. You can move the folder up and down.

You can use drag and drop functionality to move items around the tree structure.



You can delete the folder by selecting it and clicking on the  icon in the *Methodology > Library view*


You have successfully edited a folder



Create a Flowchart in the Library

Flowcharts need to be created in a third party application such as Visio. Visio will allow you to export the chart as a GIF or JPEG picture. You will need to have completed this work before completing this activity.

1. Click on the *Methodology > Library* tabs

2. Click on the  icon

3. Select flowchart from the drop down list. The following screen will be displayed:

Add Content

Item Type

Folder	Title
Flowchart	_____
Library Page	

4. Enter the title of your flowchart
5. Browse to the image of the flowchart that you have created and select it and click open

6. Select 



You have successfully added a flowchart



Create and Map Library Pages

We need to be able to map library pages to the steps in the flowchart. Our end goal is to have users click on a step in the flowchart and be taken to a library page for that step. The first step in this process is to create the library pages.

To create a library pages:

1. Click on the *Methodology > Library* tabs
2. Select the flowchart for which you wish to add library pages
3. Click on the *Add* toolbar icon 
4. Select *Library* from the drop down list
5. Enter the title of the library page (try to be consistent with the name of the step in the flowchart), make sure you create the library pages in a relevant order as each library page will be represented under each other in the tree (remember though, you can move things around at a later date, it's just quicker to get things right the first time).
6. You will now see a three-panelled screen of information. You can enter information into this screen. You may prefer to add all the library pages for the flowchart first and then add the content later.
7. Information relating to the step is entered in the main title box. There is a rich text box displayed allowing you to do most of the formatting as per MS Word. On the right hand side there is a smaller text box option to enter who actions this step and why.
8. Underneath this box is a section that allows you to add templates that might be relevant for this step. As we have not created any templates yet, we will come back to this functionality later in the course.
7. Select the save  button in the main central box to save all the work displayed on



the screen.


The best way to edit a lot of rich text in the main window is to click on the full screen icon. This displays just that box in the full screen rather than in the small box that is provided by default

You have successfully created library pages



We now need to map these library pages to the flowchart. Before being able to do this activity you will need to have mapped the hotspots of the flowchart using an HTML editor like Dreamweaver, or GIMP. This will provide you with the library coordinates in between the open `<map>` and closed `</map>` tags.

To map library pages to flowcharts:

1. Click on the *Methodology > Library* tabs
2. Select the flowchart for which the mapping will be undertaken
3. Select the edit button  above the flowchart image (not the edit button at the top of the library tree)
4. Scroll to the bottom of the image. You will see a box with space available to paste the HTML code pertaining to the map tags referenced earlier. Copy the HTML code from your editor (e.g. Dreamweaver) and paste it into the box.

Add Hotspots

Create your image map code in a html editor such as Frontpage, do not worry about adding links at this stage. Be sure to create the hotspots in a logical order, top to bottom if possible. Paste the code between the `<map></map>` tags here:

Paste Hotspots

```
<AREA shape="rect" COORDS="0,21,118,58">  
<AREA shape="rect" COORDS="174,21,292,57">  
<AREA shape="rect" COORDS="174,84,293,121">  
<AREA shape="rect" COORDS="174,147,293,184">
```





- Click on the add icon to add the image map to the system.
- A list of shape IDs will be presented below for you to then map to a library page in the drop down list to the right.

Allocate Links to Hot Spots

The hot spots will appear in the same order that they were created in front page.

ID	Shape	Coordinates	Link
239	rect	1, 24, 118, 63	Create Calendar
240	rect	2, 87, 119, 127	Awareness Campaign
241	circle	212, 181, 43	Visit Projects
242	circle	311, 90, 42	Create Presentations
243	circle	410, 181, 47	Maturity Model Survey
244	circle	312, 281, 47	Maturity Survey Report
245	rect	251, 376, 370, 419	Approved Positional Paper
246	rect	250, 449, 371, 488	Revised Awareness Campaign



If the hotspots were created in the same order as the library pages then this should be a sequential process of selecting the next library page in the list as you move down the hotspots. Otherwise, some trial and error may be required.



- Click the save button
- Test that the mappings are correct by clicking on each of the flowchart steps and checking if the correct library page is displayed.

You have successfully mapped library pages to flowcharts

Create a Prioritisation Framework

Based on an organisation's own methodology, UniPhi allows for the creation of a prioritisation framework to help prioritise their portfolio of projects. The framework consists of a series of questions and answers, set up by the administrator, which when completed by end users results in a score that helps identify high to low priority projects.

The framework can be completed when a new project is added by a user and is found by scrolling down on the *Portfolio > Summary > New Project* page.

Project Prioritisation Framework		
Questions	Answers	Score
What is the size of the fee (or commission)	<input type="radio"/> >100,000 <input type="radio"/> >50,000 <input type="radio"/> >10,000 <input type="radio"/> <10,000	0
What is the likely profit margin?	<input type="radio"/> >40% <input type="radio"/> >20% <input type="radio"/> >10% <input type="radio"/> >0	0
		Total Score: 0

Once completed a final score is applied to the project. This score gives the project a rank of importance and helps determine which daily activities resource pool should work on - critical activities. Projects can also be killed when they're no longer valuable, freeing resources for other more critical tasks.


Critical Projects are given a higher ranking (highlighted in red) helping to focus the efforts of the project team:



<input type="checkbox"/>	Ext	Int	Project ID	Project Name	Priority	Current Phase	Project Type	Location	Start Date	Finish Date	Cost Budget
<input type="checkbox"/>	●	●	1429	Charters Towers	100	Submission	Internal	Sydney	Feb 03 2017	Apr 24 2019	\$82,725,967
<input type="checkbox"/>	●	●	1409	Coles Mixed Retail Complex - Hurstville	25	Construction	Internal	Sydney	Aug 30 2016	Mar 30 2018	\$305,000
<input type="checkbox"/>	●	●	1408	Coles Store Program	15	Construction	Refurbish	Sydney	Jan 06 2015	Dec 25 2017	\$2,662,110
<input type="checkbox"/>	●	●	17505	ANZ Bank Potts Point	0	Opportunity	Fit Out	Adelaide	Jun 22 2017		\$43,950,400
<input type="checkbox"/>	●	●	17504	Coles - Burwood East	0	Opportunity	Fit Out	Los Angeles			\$45,000,000

To establish a Prioritisation Framework:



1. Go to the *Configuration > Prioritisation* tabs:

2. Click the  button to start building your framework

3. Enter in the first question and order:

Project Prioritisation Framework Questions

Order	Question
4	<div style="border: 1px solid gray; padding: 5px;"> <p>What is the size of the fee (or commission)?</p> </div>

The default answers are Yes and No. You can now edit the answers and/or add more by clicking the



4. Click to save the question and commence entering possible answers and scores:

Order	Questions	Answers	Order	Score
1	<div style="border: 1px solid #ccc; padding: 5px;"> <p>What is the strategic importance of the client?</p> </div>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Answers</p> </div>		
		>100,000	1	20
		>50,000	2	10
		>10,000	3	5
		>1,000	4	0
			5	

- Amend (if required) the answers to match your organisation’s methodology and enter a score against each answer.

You know how to create a prioritisation framework

Exporting Documents from UniPhi

Within the Admin tab, Administrators are able to export document from the system. This may be required at the end of a project and once UniPhi is no longer required, or to satisfy legal or audit inspections.

- Go to the Configuration / Document Export tab

Document Export

Instructions

1. If the Download and Clear buttons are visible, then an export archive already exists. Click Clear if you would like to start a fresh archive.
2. Select the desired filters and click Export to add documents to the export archive.
3. Repeat step 2 for any additional filters, each time you click Export it will append to the existing archive.
4. Click Download to download a zip file containing all the archived files.
5. If you have finished, click Clear to remove all previously exported files from the archive.
6. The start/end date filters apply to the document last modified date, unless the Signed Off status is selected, in which case they apply to the signed off date of the document

Create folder for projects

None
 Project Name
 Project ID - Project Name

Create folder for templates

Yes
 No

Export document version

Latest Document Version
 All Document Versions

Template: All ▼ Status: All ▼ Start Date: _____ End Date: _____

EXPORT

2. The export document panel presents all available options for exporting documents from UniPhi. The configurable options available include:

- *Create folder for projects* – allows you to specify the name of your output folder structure. If project ID and name are important for future reference, you will choose Project ID – Project Name
- *Create folder for templates* – will group all documents within a folder per template. Your structure would therefore appear as:
 - Project XYX
 - Template A
 - Template B
 - Template C, etc.
- *Template* – Allows for a single template selection which will extract all document produced by the selected template, or you may choose to select

all templates which will naturally extract all documents that have been created

- *Status* – Allows you to specify the status of the document(s) that you are extracting. You may only require signed off documents, or you may require documents regardless of their status (private, draft, open for review, awaiting sign off, signed off, and closed)
- *Start Date / End Date* – Allows you to specify a date range of document that you would like to export

3. Once you have determined your export requirements, UniPhi will export your documents into a PDF format. The entire extract will be provided to your local PC in a compressed zip file format. You may then extract and save your UniPhi documents to another location.

APPENDIX

Current Document Controls

The following pages present examples of both the template design view, configurable options, and the resulting output document view for each input object in the UniPhi system. Document Templates are simply a combination of one or more of these Input Objects that allow for presentation of project and portfolio data.

In most cases the Template Input Objects are referencing a project and will therefore present data in the context of that project.

Where the project is nominated as a parent project and “child” projects are present some of the Template Input Objects will display rolled-up information for the total of all child and the parent project.

Some Template Input Objects provide allow for a Portfolio view to be selected, e.g. Issues Detailed & Issues Summary.

Accounting Costs

This object will present periodic financial information for the project.

Source of Data

The source of the data is the UniPhi Costs system for the project. Accounting Costs reflect financial periods selected for the month and financial year. The Phasing view will provide the monthly detail while the whole of project and financial year values are shown in various views within the Costs system.

Template Object

Allows for a defined chart of accounts to be selected. For a chart of accounts which has several levels of information, you may specify the depth level that the user will be presented as a default. The Code Format drop down allows you to specify the presentation of the chart of accounts structure. You may choose to display the only the description, only the code, or a combination of code and description. Within the template design, it is also possible to modify the output format of the table; column headings may be re-labelled, and individual columns may be shown, or hidden from view. In each of the above settings, the end user will be able change the defaults within their document, if necessary.

Cost Codes: New Cost CoA | Code: Project | Depth: Level 1 | Code Format: Description

Cost Code	Month					Actual	Forecast
	Actual	Forecast	Budget	VTF	VTB		

VTF = Variance to Forecast (Forecast - Actual)
 VTB = Variance to Budget (Budget - Actual)
 VLF = Variance to Last Forecast (Last Forecast - This Forecast)

Last Forecast: The most recent signed off document for this project and cost codes selection.

The resulting document will present to the author the accounting costs for the project for the period selected.

Document Edit View

Accounting Costs

Cost Codes: Post Contract | Code: Project | Depth: Level 3 | Code Format: Description

Select Month: Jan 2023 | Currency: GBP | Last Forecast Document: []

Cost Code	Jan 2023						Actual
	Actual	Forecast	Budget	VTF	VTB		
Construction	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£2,135,970	
Early works & demolition	£0	£0	£0	£0	£0	£0	
FF & E	£0	£0	£0	£0	£0	£0	
ICT Contractor	£0	£0	£0	£0	£0	£0	
Main Works	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£2,135,970	
Authority Charges	£0	£0	£0	£0	£0	£0	
Town planning application	£0	£0	£0	£0	£0	£0	
Permits	£0	£0	£0	£0	£0	£0	
Headworks & Charges	£0	£0	£0	£0	£0	£0	
Services	£0	£0	£0	£0	£0	£0	
Consultants	£0	£0	£0	£0	£0	£0	
Architect	£0	£0	£0	£0	£0	£0	
Project Manager	£0	£0	£0	£0	£0	£0	

The document author selects the appropriate month and cost code chart for the appropriate data. The default page orientation is Landscape to cater for the width of the chart.

Budget														
Cost Code	Jan 2023					Year To Date					Total			
	Actual	Forecast	Budget	VTF	VTB	Actual	Forecast	Budget	VTF	VTB	Forecast	Budget	Variance	VLF
Construction	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£13,972,820	£84,139,882	£70,167,062	
Early works & demolition	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£3,238,009	£17,273,970	£14,035,961	
FF & E	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£924,110	£1,252,171	£328,061	
ICT Contractor	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£857,444	£11,260,484	£10,403,040	
Main Works	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£2,135,970	£0	£0	(£2,135,970)	(£2,135,970)	£8,953,257	£54,353,257	£45,400,000	
Authority Charges	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£130,632	£261,264	£130,632	
Town planning application	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£105,632	£211,264	£105,632	
Permits	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£25,000	£50,000	£25,000	
Headworks & Charges	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£915,353	£5,261,985	£4,346,632	
Services	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£915,353	£5,261,985	£4,346,632	
Consultants	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£7,814,470	£8,428,221	£613,751	
Architect	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£4,429,264	£52,511	(£4,376,753)	
Project Manager	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£205,225	£5,442,210	£5,236,985	

The output view is taken from the on screen HTML view of the document. The PDF output will vary depending on the selection of style sheet and the applicable styles.

Auto Number

This creates an automated number. Depending on the settings the auto number may be a sequential number, or a unique number. The auto number may be used for Variations, Requests for Information, Defects, etc. where having a unique reference and sequence is required.

Source of Data

The source of this data field is from within the document itself. This will be either on document creation or sign-off depending on the option selected.

Input Object Type Hide Output

Auto Number ▼

Type

- Sequential number for each document created from this template per project
- Unique document number which persists between versions of a document
- Unique document number which changes with each version of a document
- Sequential number for each document created from templates using a named sequence

Generate a sequential document number on

Document Creation ▼

The first option simply creates a sequential number each time the template is used.

Option two allocates a number to a document. Importantly that number does not change as and when the version of the document is changed

Option three allocates a number to a document, and that number changes each time the document is modified.

In all of the above options you may choose to generate the automatic number when the document is created, or when it is signed off.

Note that by default the document auto number will commence at 1, and then progress to 2, 3, 4, etc. sequentially. If you require the sequence to start at a specific number you may enter in the next number in the sequence that you require. All subsequent documents will follow the number sequence that you set

Document Edit View



Auto Number

Step Title

Auto Number

Page Orientation: Portrait ▼ Page Break: None ▼ Hide Output:

1

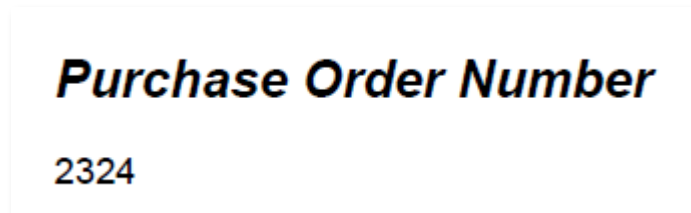
In the resulting document the Auto Number step will appear. Note, it may be edited.

Generating the number sequence on Document Sign-off is used where the document or record is not included in the sequence until it is approved or accepted. Progress Claims are an example of numbering on sign-off.

In the resulting document the Auto Number value will not be shown until after sign-off.

Document Output View

If the step is not hidden, which it can be if it is purely for an internal numbering reference, then it will appear similar to this.



As with any of the input objects the heading size and presentation can be modified in the Document Edit view.

The auto number can also be displayed in a rich text object using a standard template variable `$document.autonumber`

Benchmark

The Benchmark control is used to associate your project data with data that has been captured against other projects. This is useful for comparative purposes, and can be configured to compare all projects, or those which meet specific comparable criteria.

Source of Data

Benchmark data is drawn from a number of sources, and encompasses your current project, and the data of other projects which have been completed. By default, the data is drawn from like for like comparable projects, e.g. those which belong to the same Sector, Project Type, Sector, and those which use the same chart of accounts for budgeting). Project Custom Fields and Metrics may also be used to help narrow down the number of projects presented for benchmark comparison.

Template View

The template view has no selections made by default. This will simply present the document author with a list of projects that matches the project that they are benchmarking. Typically this default setting will be the simplest option, though you may select options such as Metrics Chart of Accounts, if you intend creating numerous benchmark templates, per chart of accounts.

Benchmark Elements

Input Object Type

Benchmark Elements ▼

Template Mode

Portfolio ▼

Location

All Locations ▼

Chart of Accounts

NPWC ▼

Hide Output

Sector

All Sectors ▼

Lifecycle

All Phases ▼

Project Type

All Project Types ▼

Code Format

Code - Description ▼

Service Line

All Service Lines ▼

Benchmark Column

\$/m2 FECA ▼

Data will be returned across all projects contained in the selected project filters

✓

Benchmark Projects

Step Number: 4 | Step Title: Benchmark Projects | Heading Style: Heading 1 | Page Break: None | Page Orientation: Portrait

Step Description

B *I* U ABC | | | |

Input Object Type: Benchmark Projects | Hide Output:

Project Phase: No Selection | Project Custom Fields Category: No Selection | Metrics Chart of Accounts: No Selection | Metrics Category: No Selection

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Project
<input checked="" type="checkbox"/>	All
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	

Document Edit View

The document author may choose to selectively show or hide specific projects. In the example below, two projects have been removed from view as they do not have relevant data. The author may also edit the column heading – e.g. they may rename NLA to be Net Lettable Area. Different, or multiple selections can be made to draw on more extensive metrics, charts of account, custom categories, etc.

Benchmark Elements

Benchmark Elements

Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines | Location: All Locations

Lifecycle: All Phases | Project: Charters Towers, - Happy Views Stage 1

Chart of Accounts: NPWC | Depth: Level 3 | Code Format: Code - Description | Benchmark Column: \$/m2 FECA

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All	Charters Towers	Happy Views Stage 1	
<input checked="" type="checkbox"/>	\$/m2 FECA	\$/m2 FECA	
<input checked="" type="checkbox"/>	1.0 - Preliminaries	£593	£407
<input checked="" type="checkbox"/>	00PR - Preliminaries	£593	£407
<input checked="" type="checkbox"/>	2.0 - Substructure	£249	£187
<input checked="" type="checkbox"/>	01SB - Substructure	£249	£187
<input checked="" type="checkbox"/>	3.0 - Superstructure	£863	£5,087
<input checked="" type="checkbox"/>	02CL - Columns (Framed Buildings)	£15	£5
<input checked="" type="checkbox"/>	03UF - Upper Floors	£176	£12
<input checked="" type="checkbox"/>	04SC - Staircase	£14	£2,025

Benchmark Projects

Benchmark Projects

Sector	Project Type	Service Line	Project Phase
Residential	New Build	Project Management	No Selection
Project Custom Fields Category	Metrics Chart of Accounts	Metrics Category	
No Selection	No Selection	No Selection	

<input checked="" type="checkbox"/> Project
<input checked="" type="checkbox"/> All
<input checked="" type="checkbox"/> 489 Bell Street Apartments
<input checked="" type="checkbox"/> 500 Toorak Road Apartments
<input checked="" type="checkbox"/> 537 Bell Street Apartments
<input checked="" type="checkbox"/> 567 Bell Street Apartments
<input checked="" type="checkbox"/> 587 Bell Street Apartments
<input checked="" type="checkbox"/> Affordable Housing 2
<input checked="" type="checkbox"/> Architectural metalwork
<input checked="" type="checkbox"/> CASTLE TOWERS REDEVELOPMENT
<input checked="" type="checkbox"/> Cheerful Views Estate
<input checked="" type="checkbox"/> Civil Engineering
<input checked="" type="checkbox"/> Cleaning
<input checked="" type="checkbox"/> Concrete

Budget

The Budget object is used to display varying levels of financial information as relevant to your project

Source of Data







Data comes from entries made in your Costs Tab, and entered via the Project Budget section.

Template View

When preparing your template to use the Budget control, you may choose to display costs at the Project, or Portfolio level, by selecting the desired option from the Template Mode drop down box. You may also choose to select the level of financial information to be a high level (Level 1), or a more granular and detailed breakdown (level 3, 4, 5, etc.). In the event that you have numerous Charts of Accounts (CoA), you may selectively choose the correct CoA for your project. Your template may also be configured so that the budget for a project is locked in as being an "Original" budget, an "Approved" budget, or as being both "Original and Approved"

Step Number	Step Title	Heading Style	Page Break	Page Orientation
5	Budget	Heading 1	None	Landscape

Step Description

B *I* U ABC |      

Input Object Type	Hide Output
Budget	<input type="checkbox"/>

Template Mode

Project







Data will be returned for the project the document is created in (including child project if created in a parent project)

Chart of Accounts	Depth	View	Round
New Cost CoA	Level 1	Full Budget	None

Budget Summary

Step Number	Step Title	Heading Style	Page Break	Page Orientation
6	Budget Summary	Heading 1	None	Portrait

Step Description

B *I* U ABC |      







Input Object Type	Hide Output
Budget Summary	<input type="checkbox"/>

Chart of Accounts	Round
New Cost CoA	None

Budget Summary Text

Step Number	Step Title	Heading Style	Page Break	Page Orientation
7	Budget Summary Text	Heading 1	None	Portrait

Step Description

B *I* U ABC |      

Input Object Type	Hide Output
Budget Summary Text	<input type="checkbox"/>

Chart of Accounts

New Cost CoA

Document Edit View

Depending on the desired level of financial information you wish to present in your output document, you may display the project information at a high level summary, through to a more detailed and granular level

Budget ⚙️

Chart of Accounts: Post Contract | Code: Project | Depth: Level 3

View: Full Budget | Version: Current | Compare To: None

Code Format: Code - Description | Currency: GBP | Round: None

Include child budget tables: | Exclude Completed Child Projects:

Current							
✓ Code	✓ Qty	✓ Unit	✓ Rate	✓ Total (GBP)	✓ %	✓ Sim2 FECA	\$
100 - Construction				84,900,730.02	85%		
100.1 - Early works & demolition	2	unit	8,636,985.00	17,273,970.00	17%		
100.2 - Main works (old)	0	%		0.00	0%		
100.3 - FF & E				1,252,171.02	1%		
100.4 - ICT Contractor	2	unit	6,010,666.00	12,021,332.00	12%		
100.5 - Main Works				54,353,257.00	54%		
200 - Authority Charges				261,264.00	0%		
200.1 - Town planning application	2	unit	105,632.00	211,264.00	0%		

Budget Summary

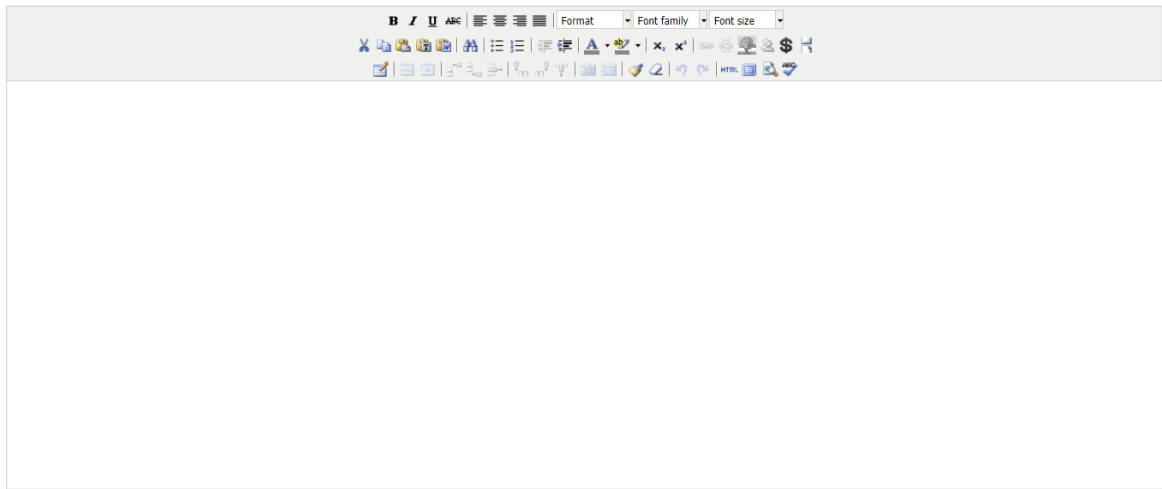
Budget Summary ⚙️

Chart of Accounts: Post Contract | Version: 14: Revised Budget (Approved) | Round: Whole Number

No data exists for the specified filters.

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Budget Summary Text



As more detailed views are selected, you will be able to present variance analysis, whereby your current budget is displayed alongside any previous budget versions. This can be useful in comparing project budgets throughout the project lifecycle.

Cashflow

Presents project level phased cashflow details from either cost of fees tabs.

Source of Data

The cashflow data is presented in three columns; Budget, Forecast, and Actual. The budget information comes from your phased project budget, and will be presented according the date range to which is has been phased. Forecast is also drawn from your phased forecast to complete. Actual values come from actual claims/invoices which have been raised and signed off

Template View

The template allows you to specify the chart of accounts that your cashflow relates to.

Input Object Type: Cashflow Hide Output

Template Mode: Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Chart of Accounts: New Cost CoA | Code: Project | Data: All

Document Edit View

When creating your document, you may choose to change the chart of accounts and currency. All columns can be selectively shown or hidden, and column titles may also be changed if necessary.

Cashflow ⚙️

Chart of Accounts: Post Contract | Code: Project | Data: All | Currency: GBP

✓ Period	✓ Budget		✓ Forecast		✓ Actual	
	✓ Monthly	✓ Cumulative	✓ Monthly	✓ Cumulative	✓ Monthly	✓ Cumulative
2019/2020 Financial Year						
Jun 2020	2,620,360	2,620,360		0		
Sub Total	2,620,360	2,620,360	0	0		
2020/2021 Financial Year						
Jul 2020	2,739,148	5,359,508		0		
Aug 2020	3,434,473	8,793,981		0		
Sep 2020	3,930,758	12,724,739	955,286	955,286		
Oct 2020	4,121,927	16,846,666	1,037,817	1,993,103		
Nov 2020	4,267,552	21,114,218	1,124,813	3,117,916		
Dec 2020	3,509,189	24,623,407	708,192	3,826,108		
Jan 2021	3,530,213	28,153,620	728,340	4,554,448		
Feb 2021	4,417,065	32,570,685	1,297,804	5,852,252		
Mar 2021	5,187,382	37,758,067	1,675,613	7,527,865		
Apr 2021	5,297,697	43,055,764	1,454,009	8,981,874		
May 2021	5,448,444	48,502,208	1,998,961	10,980,835		
Jun 2021	5,131,840	53,634,048	2,303,255	13,284,090		
Sub Total	51,013,688	53,634,048	13,284,090	13,284,090		

Document Output View

The document output largely matches the document template control.

Contract Deliverables

The contract deliverables object is used to display line item details of a contract for the project.

This is useful in reporting for Cost contracts and in preparation of proposals for Revenue contracts.

Source of Data


The data source for this object is the Contracts system for the project.

Template View

Input Object Type: Contract Deliverables Hide Output:



Will allow the selection of a contract to populate a list of contract details and deliverables.

Flag Contract as Committed on Signoff
 Status On Signoff: No Change
 Hide Header
 Code Format: Code



Deliverable	Ref	Code	Qty	Unit	Rate	Amount	Start Date	End Date
✓ Total								

Columns can be added or removed by clicking on the button above the table.

- Deliverable
 - Ref
 - Code
 - Qty
 - Unit
 - Rate
 - Amount
 - Tax Amount
 - Tax Inclusive Amount
 - Status
 - Lifecycle
 - Start Date
 - End Date
-  

Check the box for Include Schedule Dates if you would like the schedule dates to be displayed from the details entered within the contracts tab

Checking the box to Flag Contract as Committed on Sign-off will only show your contract as being committed when the document is signed off. If you require the document to leave the contract in an uncommitted state after sign off, then un-tick this box.

Document Edit View


Contract Deliverables ⚙️

Type Select Supplier Select Contract(s)

Cost Alex Rose (West Coast Constructions Pty Ltd) Geotechnical Services (Active)

Depth Code Format

All Code






Geotechnical Services

Customer: Megan Visser (Optimum Construction Pty Ltd) **Commencement:** 01 Dec 2015

Supplier: Alex Rose (West Coast Constructions Pty Ltd) **Practical Completion:**

Deliverable	Ref	Code	Qty	Unit	Rate	Amount	Start Date
✓ All							
✓ Initial Site Survey		400.15				\$25,000.00	
✓ Geotech Report		400.15				\$5,000.00	
✓ Total						\$30,000.00	

In the resulting document the contract can be selected and can be displayed with or without the schedule. Individual deliverable items from the contract can be selectively shown or hidden as required.

Document Output View

Contract Deliverables

Geotechnical Services

Customer: Megan Visser (Optimum Construction Pty Ltd) **Commencement:** 01 Dec 2015

Supplier: Alex Rose (West Coast Constructions Pty Ltd) **Practical Completion:**

Deliverable	Ref	Code	Qty	Unit	Rate	Amount	Start Date	End Date
Initial Site Survey		400.15				\$25,000.00		
Geotech Report		400.15				\$5,000.00		
Total						\$30,000.00		

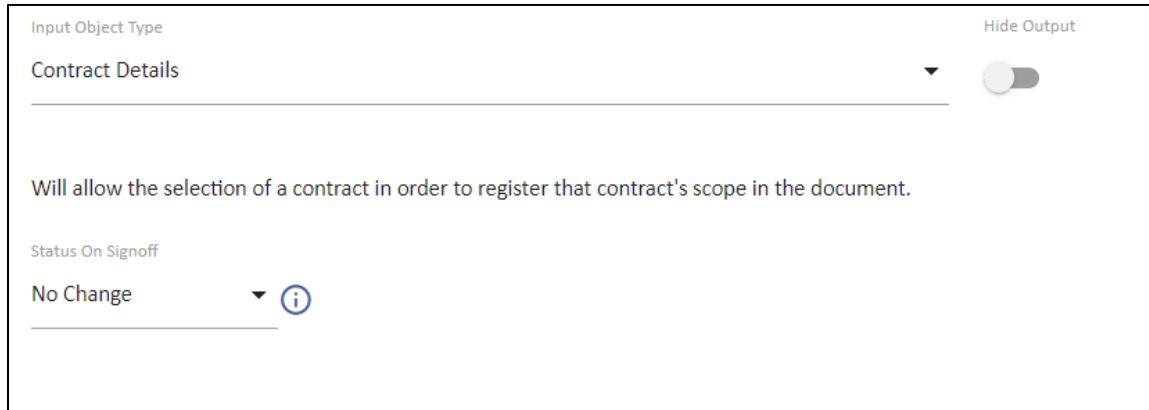
Note: all amounts exclude tax

Contract Details

The Contract Details object is a contract selector to associate a document with a contract. This also allows for contract oriented template variables to be used in any Rich Text box in the document.

The data source for this object is the Contracts system for the project.

Template View

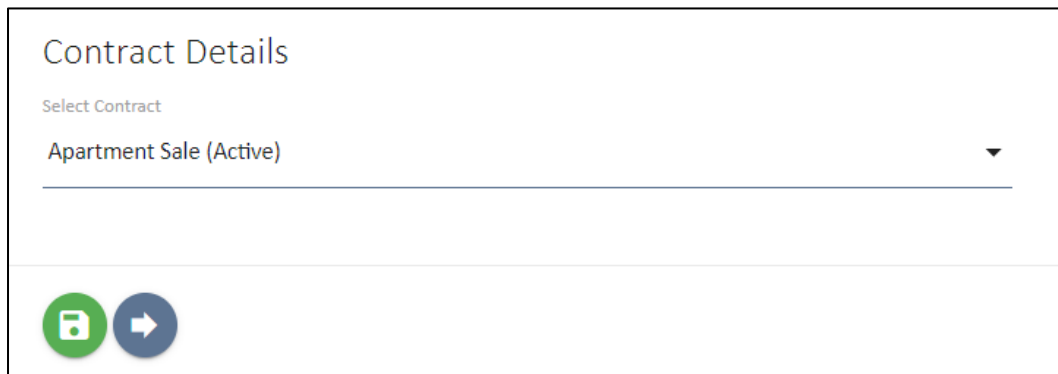


The screenshot shows the configuration interface for the 'Contract Details' object. At the top left, it says 'Input Object Type' with a dropdown menu currently set to 'Contract Details'. To the right of this is a 'Hide Output' toggle switch, which is currently turned off. Below the dropdown, there is a horizontal line. Underneath the line, the text reads: 'Will allow the selection of a contract in order to register that contract's scope in the document.' Below this text, there is a label 'Status On Signoff' followed by a dropdown menu set to 'No Change' and an information icon (i).

There are no configurable options for the Contract Details object.

Document Edit View

Similarly, in the resulting document there are no options for this object. Simply select a contract from the selector list.



The screenshot shows the 'Contract Details' section in a document edit view. The title 'Contract Details' is at the top. Below it is a label 'Select Contract' followed by a dropdown menu showing 'Apartment Sale (Active)'. At the bottom left of the section, there are two circular icons: a green one with a document icon and a blue one with a right-pointing arrow.

Document Output View

There is no output for the Contract Details Input Object as it is assumed that the selection of the contract is evidenced from other information in the document. However, the document is linked to the Contracts system as a result of this object being used in the document. The selection of a contract links the document to the contracts system and depending on the other details in the document will appear in the Related Documents Register on the Contract View screen.

Use this with the Issue Selector object to prepare documents that link between Issues, Contracts, & Documents to provide a complete record of contract related issues.

Contract EOT

The Contract Extension of Time (EOT) object provides for preparing a document that supports a record of an approval process for an extension of time on a project Cost contract schedule.

Source of Data

The data source for this object is the Contract Extension of Time listing for a Cost contract in the Contracts system for the project.

Add the extension of time claim to the contract for it to be accessible by the document.

Stowe: Apartment Sale Extension of Time

ID	Ext ID	Reason
1		

Extension For	Status	Date	Days Awarded	Adjusted Completion
Entire Contract	Possible	15/11/2023		

There are currently no time extensions for this contract.

Template View

Step Number	Step Title	Heading Style	Page Break	Page Orientation
11	Contract EOT	Heading 1	None	Portrait

Step Description

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Input Object Type: Contract EOT

Hide Output:

Will allow the selection of a contract and the population of an extension of time approval.

There are no configurable options for the Contract EOT object.

Document Edit View

In the document select the relevant contract.

Contract EOT

Select Contract

Apartment Sale (Active) ▼

ID	Ext ID	Extension For	Reason	Date	Days Awarded	Adjusted Completion
<div style="display: flex; justify-content: space-between; align-items: center;"> <input type="radio"/> <input type="radio"/> </div>						

The list of extension of time claims for the contract will be displayed. If there are more than one EOT on the contract, you can use the radio button to the left to select which EoT is relevant for the document.

Document Output View

The document output includes a summary of the impact of the extension on the schedule of all the EoT's approved.

Contract EOT

ID	Ext ID	Details of Extension of Time:
Days Awarded on this EOT		
Extension of Time Summary:		
Contract Commencement Date		
No of Days Awarded to Date		
Days Awarded on this EOT		
Total Days Awarded to Date		
Adjusted Date for Practical Completion		

Contract Registers

The Contract Registers object provides for listing variations, progress claims, extensions of time and requests for information that relate to a contract. It is used for documents that report on contract progress.

Source of Data

The data source for this object is the Contract related documents and data entry from the Contract summary view.

Template View

Input Object Type Hide Output

Contract Registers

Register Type Contract Status

Acceptance All

ID	Document	Template	Date	Date Sent

Input Object Type Hide Output

Contract Registers

Register Type Contract Status

Acceptance All

ID

Document

Template

Date

Date Sent

There are no options for the Contract Registers object.

Document Edit View

You will be presented with 2 drop down selection items. The first is the Register type, and allows you to select the type of contract item that you wish to view. The second list displays the names of suppliers for each contract that has been created within the selected project.

Contract Registers

Register Type

- EOTs
- Invoices
- Progress Claims
- Variations

Contract Status

All

- Apartment Sale (Active)
- Architect (Active)
- Cost Management Services (Active)
- Early Demolition Works (Active)
- Early Works - Stage 1 (Active)
- Electrical Engineering Services (Active)
- Engineering Services (Active)

Depending on the selection made, UniPhi will present each of the contract related items. UniPhi will also inform you that no items exist. In the example below you can see that the Construction contract has not had any progress claims.

Contract Registers

Register Type: Variations | Contract Status: All | Variation Status: All

Select Supplier: James Levene (3rd Party IT Solutions)

Select Contract(s): All, Engineering Services (Active)

Engineering Services

ID	Ext ID	VO No	Variation	End Date	Status	Submitted
1			Change for a reason		Pending	\$0.00
Pending Total:						\$0.00
Total:						\$0.00

Buttons: Save, Next, Close

Document Output View

The resulting document output will display the selected listing.

Contract Registers

Engineering Services

ID	Ext ID	VO No	Variation	End Date	Status	Submitted	Amount
1			Change for a reason		Pending	\$0.00	\$0.00
Pending Total:						\$0.00	\$0.00
Total:						\$0.00	\$0.00

Contract Variations

The Contract Variations object displays the details of variations that relate to a contract within a project. It is used for documents that approve variations that are flagged as Pending (Pending Approval).

Source of Data

The data source for this object is the Variations entered in the selected Contract claim view.

Template View

Notice that the document control allows for the selection of variation categories. Your organisation can create specific variation categories. Once created, they can be set within your document template.

The document control column headings are configurable. You may choose to show or hide particular columns, and even re-name default column headings as required

Input Object Type: Contract Variations Hide Output

Will allow the selection of a contract and the population of contract variations.

Do Not Approve On Signoff ⓘ Code Format: Code

Category: All

Variation Order No. ⓘ

Variation Detail

ID	Ext ID	Category	Variation	Code	Start Date	End Date	Submitted	Qty	Unit

Display Summary Block ⓘ

Display Summary Block



- Cost of Variation ⓘ
- Contract Summary ⓘ
- Original Contract Summary ⓘ
- Variations to Date ⓘ
- This Variation ⓘ
- Total Variations ⓘ
- Current Contract Value ⓘ

Document Edit View

In the document select the relevant supplier and contract.

Contract Variations ⚙️

Select Supplier: **Jeremy Roberts** Select Contract(s): **Information Services (Active), Main Works (Active)**

Category: **All** Depth: **All** Code Format: **Code** Date: **15/11/2023**

<input type="checkbox"/> Variation	<input checked="" type="checkbox"/> ID	<input checked="" type="checkbox"/> Ext ID	<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> Code	<input checked="" type="checkbox"/> Start Date	<input checked="" type="checkbox"/> End Date	<input type="checkbox"/> Submitted
<input type="checkbox"/> All							
<input type="checkbox"/> Asbestos contamination in outer sheds	1	5a	Latent Conditions	100.5			\$120,000.00
<input type="checkbox"/> PSA - Large Confronting Sculpture	2		Client	100.5			\$0.00
<input type="checkbox"/> PSA - Removal of Provisional Sum	3		Client	100.5			\$0.00
<input type="checkbox"/> Extra thing for the client	4		Client	100.5			\$0.00

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This displays the variations listing. Pending Variations are identified by the check box to the left of the item. You may choose to show or hide previous variations.

The Certification Date is a mandatory field while it is also expected that at least one variation will be checked for inclusion. If no variation is checked then a \$0 value document will be generated.

The Approved and Possible Variations are listed for reference purposes, while any Rejected Variations are not listed.

Document Output View

The resulting document output presents the Variations selected and a summary of the contract value based on the approval of this Variation Approval document.

Contract Variations

Variation Order No: [Issued On Document Signoff]

Variation Detail:

Variation	ID	Ext ID	Category	Code	Start Date	End Date	Amount
Asbestos contamination in outer sheds	1	5a	Latent Conditions	100.5			\$80,000.00
PSA - Large Confronting Sculpture	2		Client	100.5			\$4,500.00
PSA - Removal of Provisional Sum	3		Client	100.5			(\$5,000.00)
Extra thing for the client	4		Client	100.5			\$100,000.00

Cost of Variation: \$179,500.00

Contract Summary:

Original Contract Summary	\$54,913,292.00
Variations to Date	\$0.00
This Variation	\$179,500.00
Total Variations	\$179,500.00
Current Contract Value	<u>\$55,092,792.00</u>

Note: all amounts
exclude tax

Signing off the Variation Approval document commits the Variation value to the contract, changing the status of the Variation to Approved and increasing the agreed contract value. In the summary view of the contract the Adjusted Contract value will increase by the value of the newly approved variation while the Potential Variation column value will decrease by the same value.

Custom Check List & Custom Drop Down List

Custom lists are used to provide selection options that are fully configurable and specific to your organisation. The content of the lists are added by a UniPhi administrator.

Source of Data

Both of these input objects are configured in the Configuration > Custom Lists tab. A Custom Drop Down list is a selection list that caters for one selection from many options. A Custom Check List provides for presenting a selection of options in the resulting document that can be checked, for the items that are applicable.

In the above examples some custom lists have been created. Use the add icon to create a new list.

Template View

The Custom Check List provides a number of options for the output format in the Document Edit view and resulting Document Output.

Input Object Type Hide Output

Custom CheckList ▼

Custom List

List Name	List Preview	
<input checked="" type="radio"/> Contracts check	CoC	▼
<input type="radio"/> Emergency	Assembly point and evacuation route?	▼
<input type="radio"/> High Risk Work	Basic scaffolding licence SB	▼
<input type="radio"/> Induction Equip	Hard hat	▼
<input type="radio"/> Induction First	Have you established the competencies and qualifications (including trade qualifications) of the person?	▼
<input type="radio"/> IV Demo	Present to site	▼
<input type="radio"/> Meeting Checklist	List 3	▼
<input type="radio"/> NEC EWN	Project Manager to the Contractor	▼
<input type="radio"/> NEC EWN 2	Increase the total of the prices	▼

One Column	(s) o
One Column With Comments	with (
Two Columns	
Three Columns	
Four Columns	

Select the relevant Check List and the preferred Column Layout option.

The Custom Dropdown Lists are presented in a similar manner. Select the relevant Dropdown List.

There are no presentation options for this object.

Input Object Type
Hide Output

Custom DropDownList
▼

Custom List

	List Name	List Preview	
<input type="radio"/>			▼
<input type="radio"/>	Agenda Dropdown	List1	▼
<input checked="" type="radio"/>	Asset Type	Land	▼
<input type="radio"/>	Bearing	North	▼
<input type="radio"/>	Box Culverts	Foundation	▼
<input type="radio"/>	Bridges	Foundation	▼
<input type="radio"/>	Campaign	Engineering August 2018	▼

Document Edit View



For the Custom Check List select the relevant items by checking the appropriate box. In the example below we have used the single column with comments options in the template, so when using the checklist we can enter any related commentary

Custom CheckList

Step Title
Custom CheckList

Page Orientation: Portrait Page Break: None Hide Output:

- Assembly point and evacuation route?
- Closest medical facility?
- Contact details of emergency services?
- Provisions for emergency communications?



And for the Custom Drop Down list, simply select the relevant option from the Dropdown List.

Custom DropDown List

Asset Type

Land ▼

Other

The Custom Dropdown List also provides for a manual entry if the list does not provide an appropriate option for the specific document. Entering data in this field is recorded for this document only.

Document Output View

The custom lists present the selected options from the document edit view.

Custom CheckList

- Assembly point and evacuation route?
- Closest medical facility?
- Contact details of emergency services?
- Provisions for emergency communications?

Custom DropDown List

Land

Date Selector

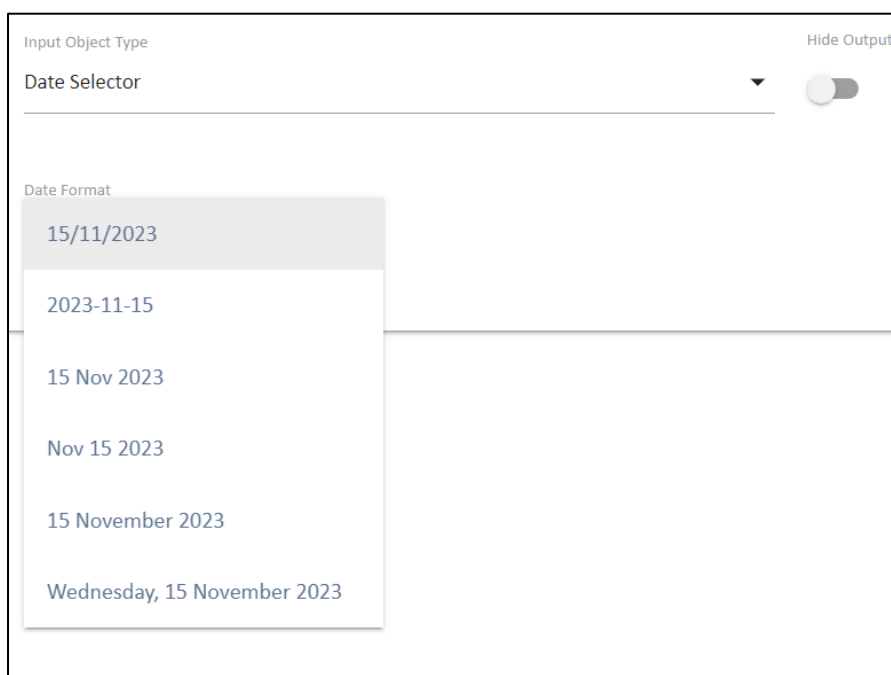
The Date Selector input object provides for either manual entry or a calendar selector.

Source of Data

The source of the data is the document creation/edit process. This date is not linked to any existing data and is relevant to the presentation in the document output.

Template View

The template Input Object includes options for various date formats.

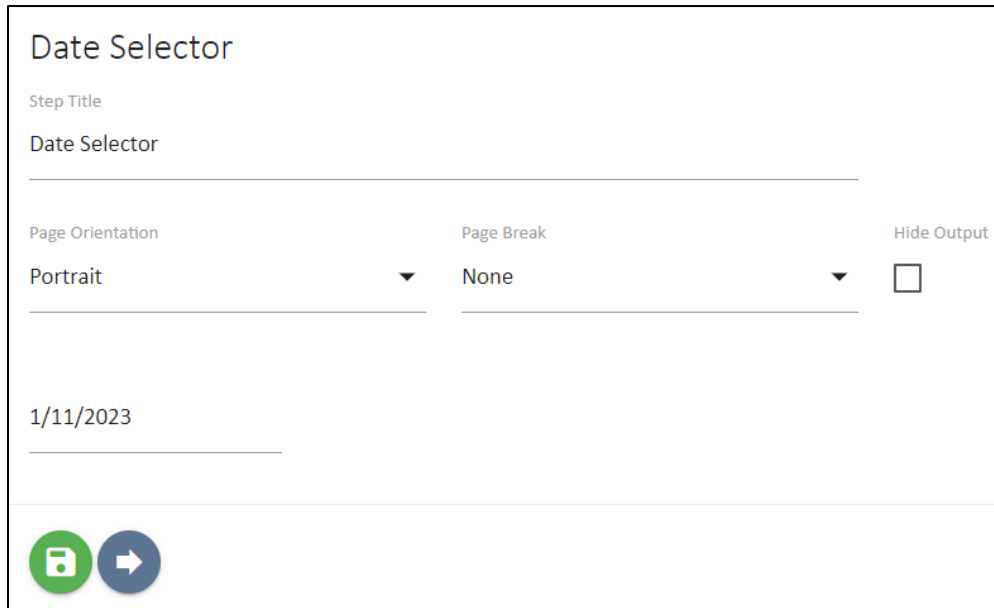


The screenshot shows the configuration interface for the Date Selector input object. At the top, it is labeled "Input Object Type" and "Date Selector" is selected from a dropdown menu. To the right, there is a "Hide Output" toggle switch. Below this, the "Date Format" section is expanded, showing a list of six date format options: "15/11/2023", "2023-11-15", "15 Nov 2023", "Nov 15 2023", "15 November 2023", and "Wednesday, 15 November 2023".

The date format is set from the template and cannot be modified in the document.

Document Edit View

In the Document Edit View the date selector is a simple entry field. Dates can be keyed manually.



The screenshot shows a 'Date Selector' step in a document editor. At the top, it is titled 'Date Selector'. Below the title, there is a 'Step Title' field containing 'Date Selector'. The main area contains three controls: 'Page Orientation' set to 'Portrait', 'Page Break' set to 'None', and a 'Hide Output' checkbox which is currently unchecked. Below these controls is a text input field containing the date '1/11/2023'. At the bottom left of the form, there are two circular icons: a green one with a document icon and a blue one with a right-pointing arrow.

Dates can also be selected with the calendar tool.

Document Output View

The date selector field can be made visible within the output document.



The screenshot shows the 'Date Selector' step as it appears in the final output document. It consists of a white rectangular box with a thin border. The title 'Date Selector' is displayed in a large, bold, blue font at the top. Below the title, the date '1/11/2023' is displayed in a smaller, black font.

As an alternative, the step may be hidden from output, and then referred to in subsequent sections of your document via the use `$document.date` template variable.

For example selecting a date within the document date step;.

Date Selector

1/11/2023|

November, 2023						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
	5	6	7	8	9	10
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Today: November 15, 2023

Then using the template variable of \$document.date to automatically populate that field from the Date Selector.

The contents of this text box can be any standard text which is appropriate for the template. Template variables can then auto-populate from selections made in previous steps, such as date: 03/09/2016.

Distribution List

A distribution list is used to validate the transmittal records for specific documents. While transmittal records are automatically maintained for documents emailed from UniPhi the use of a distribution list provides for standard roles to be nominated for inclusion as defaults for specific document types.

Source of Data

The source of the data is the resources that have been assigned to a project.

Template View

Input Object Type: Distribution List Hide Output:

✓ Name	✓ Position	✓ Role	✓ Classification	✓ Organisation	✓ Email	✓ Phone
	^	^	^	^	^	^

The template control can be configured to show or hide individual columns of information. It is also possible to change the column headings, if required

Document Edit View

The document edit view displays the list with check boxes for the team members that are to be included in the distribution list.

Step Title
Distribution List

Page Orientation: Portrait | Page Break: None | Hide Output:

<input type="checkbox"/>	Name	Position	Role	Classification	Organisation	Email	Phone
<input type="checkbox"/>	Sandra Szubert		Team Member			s.szubert@uniphi.com.au	
<input type="checkbox"/>	James Levene		Supplier		3rd Party IT Solutions		02 9555 6589
<input type="checkbox"/>	Jim Walsh		Architect		ABC Architects Pty Ltd	J.walsh@abcarchitects.com.au	
<input type="checkbox"/>	Walter Jones		Supplier		Atlantis Plumbing Services	W.Jones@APS.com.au	02 9323 9845
<input type="checkbox"/>	Arthur Williams		Client	Cost Manager	Birdcat Construction	mheath73@gmail.com	02 9658 9965
<input type="checkbox"/>	Clint Martin	Project Manager	Project Manager	Cost Manager	Birdcat Construction	chris@optimumsolutions.com	02 9323 9892
<input type="checkbox"/>	Jeremy Roberts		Supplier		Concept Building Supplies	jeremy@cbs.com.au	02 9675 5467
<input type="checkbox"/>	Bernard Neeson	Construction Reviewer	Development Manager	Cost Manager	Optimum Construction Pty Ltd	r.deo@uniphi.com.au	02 9323 9891
<input type="checkbox"/>	Bernard Neeson	Construction Reviewer	Team Member	Cost Manager	Optimum Construction Pty Ltd	r.deo@uniphi.com.au	02 9323 9891
<input type="checkbox"/>	Damien Hollingworth	Project Manager	Cost Manager	Project Manager	Optimum Construction Pty Ltd	info@uniphi.com.au	02 9323 9895
<input type="checkbox"/>	Joseph Hunter		Team Member	Cost Manager	Optimum Construction Pty Ltd	s.day@uniphi.com.au	
<input type="checkbox"/>	Blake Lewis		Supplier	Cost Manager	Stowe	blake.lewis@stoweaustralis.com.au	02 8116 0222
<input type="checkbox"/>	Frank Tovey		Supplier		Switch Master		02 9691 2675
<input type="checkbox"/>	Graham Eldridge		Project Manager		UniPhi	g.eldridge@uniphi.com.au	
<input type="checkbox"/>	Tammy Member		Team Member	Project Manager	UniPhi (Aus) Pty Ltd	simon@pianotuna.com.au	

The document author may choose to select or de-select individual contact resources, and to show, hide, or even relabel column headings. It is also possible to “sort by” any of the columns into alphabetical or numerical order.

Document Output View

The listing is a simple output with the team members name, role and organisation name if it is in the system.

Distribution List						
Name	Position	Role	Classification	Organisation	Email	Phone
Sandra Szubert		Team Member			s.szubert@uniphi.com.au	
James Levene		Supplier		3rd Party IT Solutions		02 9555 6589
Jim Walsh		Architect		ABC Architects Pty Ltd	J.walsh@abcarchitects.com.au	
Walter Jones		Supplier		Atlantis Plumbing Services	W.Jones@APS.com.au	02 9323 9845
Arthur Williams		Client	Cost Manager	Birdcat Construction	mheath73@gmail.com	02 9658 9965
Clint Martin	Project Manager	Project Manager	Cost Manager	Birdcat Construction	chris@optimumsolutions.com	02 9323 9892
Jeremy Roberts		Supplier		Concept Building Supplies	jeremy@cbs.com.au	02 9675 5467
Bernard Neeson	Construction Reviewer	Development Manager	Cost Manager	Optimum Construction Pty Ltd	r.deo@uniphi.com.au	02 9323 9891

Document Register

Source of Data

Template View

Input Object Type: Document Register Hide Output:

Template Mode: Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Category: All | Template: All | Signed Off From: | Signed Off To:

✓ Template Category	✓ Template Name	✓ Doc ID	✓ Document Name	✓ Document Author	✓ Last Modified	✓ Date Sent

Input Object Type: Document Register Hide Output:

Template Mode: Project

Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines

Lifecycle: Open Phases

Data will be returned across all projects contained in the selected project filters

Category: All | Template: All | Signed Off From: | Signed Off To:

✓ Project ID	✓ Project Name	✓ Template Category	✓ Template Name	✓ Doc ID	✓ Document Name	✓ Document Author

Document Edit View

Document Register 

Category: All | Template: All | Signed Off From: | Signed Off To:

✓ All	✓ Template Category	✓ Template Name	✓ Doc ID	✓ Document Name	✓ Document Author	✓ Last Modified	✓ Date Sent
		Budget Change Request		Budget Change Request	Jo Bloggs	18 Jun 2020	
	Contract Admin	Certified Progress Claim	1	Certified Progress Claim	Jo Bloggs	09 Nov 2023	



Document Register

Template Category	Template Name	Doc ID	Document Name	Document Author	Last Modified	Date Sent
	Budget Change Request		Budget Change Request	Jo Bloggs	18 Jun 2020	
Contract Admin	Certified Progress Claim	1	Certified Progress Claim	Jo Bloggs	09 Nov 2023	

Document Selector

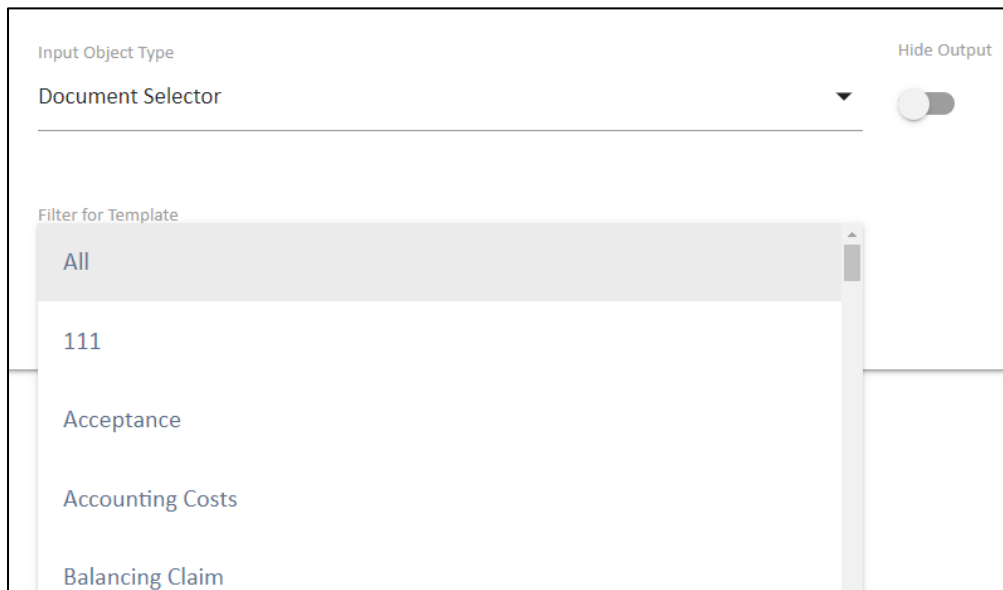
The Document Selector allows you to attach an existing UniPhi document into your template. Note: the document(s) that you wish to attach must be “Signed Off” status to be included as an attached document.

Source of Data

The signed off documents within the same project.

Template View

The Document Selector provides a default template filter option when preparing a template.

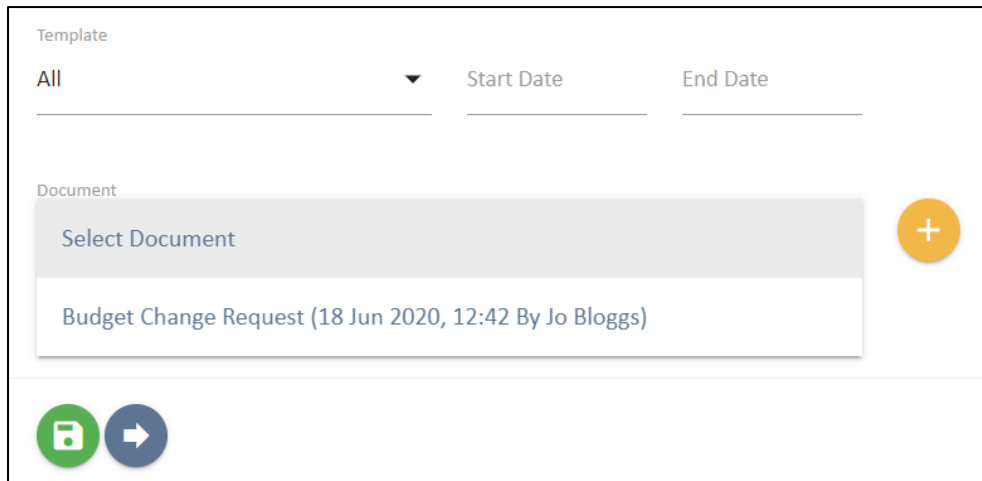


The screenshot shows a user interface for the Document Selector. At the top, there is a label 'Input Object Type' and a dropdown menu currently set to 'Document Selector'. To the right of this is a 'Hide Output' toggle switch, which is currently turned off. Below the dropdown is a section titled 'Filter for Template' which contains a scrollable list of filter options: 'All' (highlighted), '111', 'Acceptance', 'Accounting Costs', and 'Balancing Claim'.

The selected filter can be overridden at the document edit view.

Document Edit View

The document edit view provides for filtering for a specific template type and then selecting a document from the Select Document list.



Any document template may be selected as the default.

The default Template can be overridden during document editing. Selecting an existing document is completed using the Select Document listing and the add icon.

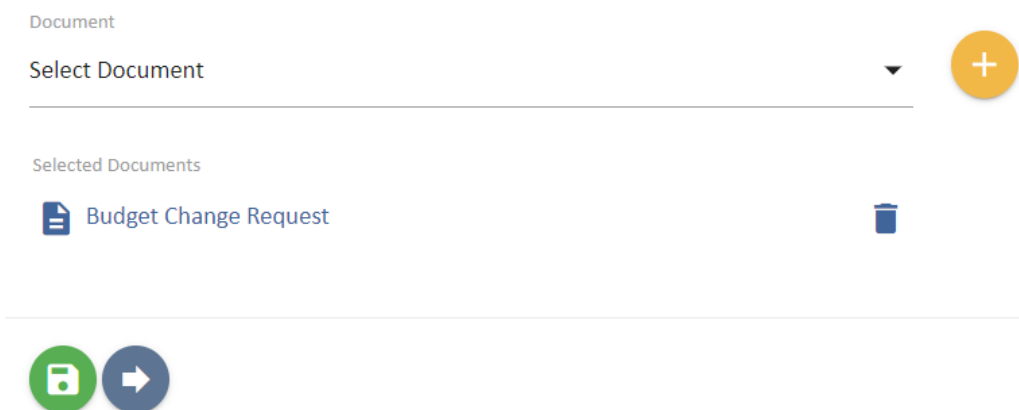
Having selected a document click the Add Selected Document icon

Once added the attached document is shown as a link within UniPhi.

The document will be displayed under a heading of selected documents.

Additional documents can be added by selecting a second or subsequent document and using the Add Selected Document icon.

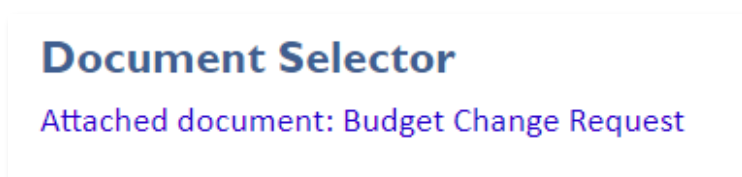
Removing an incorrectly selected document is done by clicking the remove icon.



Document Output View

There are two different outputs for this object.



In the on screen view for a team member with access to UniPhi the 'attached document' is shown as a link within UniPhi.




PDF Style: No Coversheet

PDF Options:

- ✓ Signatures
- ✓ Comments
- ✓ Transmittal

1 / 4 | - 100% + | [Print] [Share]



Commentary

The current approved budget is \$BudgetCompareTo.TotalBudget and the new requested budget is \$BudgetVersion.TotalBudget. The difference is \$BudgetVersions.TotalBudgetVariance. The additional funds are for...

Budget for Approval

14: Revised Budget						
Code	Qty	Unit	Rate	Total (AUD)	%	\$/m2 FECA \$/m2 GFA
100 - Construction				84,900,730.02	85%	
100.1 - Early works & demolition	2	unit	8,636,985.00	17,273,970.00	17%	
100.3 - FF & E				1,252,171.02	1%	
100.4 - ICT Contractor	2	unit	6,010,666.00	12,021,332.00	12%	
100.5 - Main Works				54,353,257.00	54%	
200 - Authority Charges				261,264.00	0%	
200.1 - Town planning application	2	unit	105,632.00	211,264.00	0%	
200.2 - Permits	2	unit	25,000.00	50,000.00	0%	
301 - Headworks & Charges				5,261,985.00	5%	
301.1 - Services				5,261,985.00	5%	
400 - Consultants				8,427,014.00	8%	
400.1 - Architect	2	unit	25,652.00	51,304.00	0%	
400.2 - Project Manager				5,442,210.00	5%	

Document Version History

The document history object provides a listing of all the edit sessions for the document.

Source of Data

The source of this is the document version history. This is not visible anywhere else in UniPhi.

Template View

Input Object Type: Document Version History

Hide Output:

✓ Version	✓ Document Name	✓ Created By	✓ Status	✓ Last Modified

There are no options for the Document Version History object.

Document Version History ⚙️

Step Title
Document Version History

Page Orientation: Portrait Page Break: None Hide Output:

✓ Version	✓ Document Name	✓ Created By	✓ Status	✓ Last Modified
1	Accounting Costs	Jo Bloggs	Draft	Nov 09 2023, 15:20
2	Accounting Costs	Jo Bloggs	Open for Review	Nov 09 2023, 15:31
3	Accounting Costs	Jo Bloggs	Private	Nov 15 2023, 13:10

📄
➡
✕

Documents that are in private mode are not version controlled and will always appear as version 1.

While documents are in Draft, Open for Review, or Awaiting Sign-off the version number will increment. If a document is set to Draft status when first saved then that status will appear against version 1.

Once a document is signed off this object is completed and any further revisions will be noted against a new document copied from the original.

Document Output View

The document output is a simple table reflecting the same data.

Document Version History				
Version	Document Name	Created By	Status	Last Modified
1	Accounting Costs	Jo Bloggs	Draft	Nov 09 2023, 15:20
2	Accounting Costs	Jo Bloggs	Open for Review	Nov 09 2023, 15:31
3	Accounting Costs	Jo Bloggs	Private	Nov 15 2023, 13:11

Embedded Document

Allows you to embed a previously prepared document into the document that you are generating.

Source of Data

The selection of a document to embed can be made from any document within your project, so long as the document you are selecting has been signed of (draft documents may not be embedded).

The selection of documents to embed can be made at the project level, or across the entire portfolio of documents

Template View

Input Object Type Hide Output

Embedded Document ▼

Template Mode

Project ▼

Data will be returned for the project the document is created in (including child project if created in a parent project)

Filter for Template

All ▼

Input Object Type Hide Output

Embedded Document ▼

Template Mode	Sector	Project Type	Service Line
Portfolio ▼	All Sectors ▼	All Project Types ▼	All Service Lines ▼

Location	Lifecycle
All Locations ▼	Open Phases ▼

Data will be returned across all projects contained in the selected project filters

Filter for Template

All ▼

Step Title


Embedded Document

Page Orientation Page Break Hide Output



Portrait None

Template

Acceptance ▼

 PREVIEW

Order Project Document Last Modified

Document Output View

Each of the selected documents will appear within the document you are creating. All style sheet information will be removed so that the resulting output document has a consistent look and feel.



Expenses

Source of Data

Template View

Input Object Type

Hide Output

Expenses



✓ ID	✓ Ext ID	✓ Resource Name	✓ Project ID	✓ Project Name	✓ Expense Type	✓ Description

Document Edit View

Expenses



Resource

All



Claim To

✓ ID	✓ Ext ID	✓ Resource Name	✓ Project ID	✓ Project Name	✓ Expense Type	✓ Description	✓ Expense Da
✓ All							
✓ 1		Annie Lennox	1429	Charters Towers		Flight to CNS	
✓ 2		Annie Lennox	1429	Charters Towers		Hotel	
✓ 3		Annie Lennox	1429	Charters Towers		Meals	
✓ 4		Annie Lennox	1429	Charters Towers		Flight to CNS	
✓ 5		Annie Lennox	1429	Charters Towers		Hotel	
✓ 6		Annie Lennox	1429	Charters Towers		Meals	
		Annie Lennox	1429	Charters Towers		Sub Total	
✓ 4		Cyndi Lauper	1429	Charters Towers		Flight to CNS	
✓ 5		Cyndi Lauper	1429	Charters Towers		Hotel	
✓ 6		Cyndi Lauper	1429	Charters Towers		Meals	

Expenses

ID	Ext ID	Resource Name	Project ID	Project Name	Expense Type	Description	Expense Date	Code	Currency	Tax
1		Annie Lennox	1429	Charters Towers		Flight to CNS		5-0001 - Post Contract	AUD	GST
2		Annie Lennox	1429	Charters Towers		Hotel		5-0001 - Post Contract	AUD	GST
3		Annie Lennox	1429	Charters Towers		Meals		5-0001 - Post Contract	AUD	GST
4		Annie Lennox	1429	Charters Towers		Flight to CNS		5-0001 - Post Contract	AUD	GST
5		Annie Lennox	1429	Charters Towers		Hotel		5-0001 - Post Contract	AUD	GST
6		Annie Lennox	1429	Charters Towers		Meals		5-0001 - Post Contract	AUD	GST
		Annie Lennox	1429	Charters Towers		Sub Total		5-0001 - Post Contract	AUD	GST
4		Cyndi Lauper	1429	Charters Towers		Flight to CNS		5-0001 - Post Contract	AUD	GST
5		Cyndi Lauper	1429	Charters Towers		Hotel		5-0001 - Post Contract	AUD	GST

External Comments

External Comments are an extension of UniPhi issues. The design of this control is to simply include comments (issues) which have been raised for discussion/action. It is essentially a summary of communications which need to be presented to stakeholders external to your UniPhi deployment.

Source of Data

Data is sourced from issue actions that have been logged within the issues tab.

Template View

External comments may be configured to present project issues comments, or those across the entire portfolio. The template is configurable to draw all comments, or to limit the comments to those that align to project specific sectors, project types, service lines, locations, or lifecycle stages. Comments can also be defined according to issue settings such as category, escalation, status, and rating.

If you have defined issue custom fields, these fields will also appear, and allow you to select them

Input Object Type: External Comments Hide Output

Template Mode: Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Category	Escalated To	Status	Rating
All	All	All	All
Bearing	Floor Level	Drawing type	Presentation
All	All	All	All
RFI Source	Software lifecycle	Type	Type
All	All	All	All
Code Impacted			
All			

✓ Comment	✓ External Comment	✓ Status

Document Edit View

The document author has a number of drop down menu items that they can adjust if necessary to present the correct view of external comments. Specific issues can be selected or de-selected, and column headings may be re-named.

External Comments ⚙️

Category	Escalated To	Status	Rating
All	All	All	All
Software lifecycle	Type	Type	Code Impacted
All	All	All	All

✓ Comment	✓ External Comment	✓ Status
All		
✓ Bad presentation		
✓ * Delete or modify the Actions below as required.		
✓ 16.2 Hold the first Risk Reduction Meeting with the Contractor.		
✓ 16.2 Hold the first Risk Reduction Meeting with the Contractor.		
✓ 16.4 Issue the first Risk Register (based on Contract Data).		
✓ 16.4 Issue the first Risk Register (based on Contract Data).		
✓ 31.1 Notify Contractor of non-submission of a first programme within the required period. (create a new issue and send NEC3 PM Notification).		
✓ 31.1 Notify Contractor of non-submission of a first programme within the required period. (create a new issue and send NEC3 PM Notification).		
✓ 31.1 Receive the first Programme Submission from the Contractor (create a new Issue).		

External Comments

Comment	External Comment	Status
Bad presentation		
	* Delete or modify the Actions below as required.	
16.2	Hold the first Risk Reduction Meeting with the Contractor.	
16.2	Hold the first Risk Reduction Meeting with the Contractor.	
16.4	Issue the first Risk Register (based on Contract Data).	
16.4	Issue the first Risk Register (based on Contract Data).	
31.1	Notify Contractor of non-submission of a first programme within the required period. (create a new Issue and send NEC3 PM Notification).	
31.1	Notify Contractor of non-submission of a first programme within the required period. (create a new Issue and send NEC3 PM Notification).	

File Upload / File Upload (Multi)

The file upload control allows you to attach any file into your UniPhi document. Files may be uploaded regardless of their file format. This object provides for a single file to be uploaded in the step. For multiple file uploads use the next object File Upload (Multi). The difference is that more than one file can be uploaded by using the Ctrl click or Shift click options as with a normal Windows selection process.

Source of Data

The document authors local or network accessible file storage drives.

Template View

Input Object Type
Hide Output

File Upload (Multi) ▼

Layout

Files (Default) ▼

File Description

Show ▼

Attachment in PDF

Include ▼

Versioning

Show ▼

Will display a file upload prompt with the ability to upload additional files in the same step.

Preview

Expenses.xls	Description 1
Invoice_statement.pdf	Description 2
Certified_Progress_Claim.pdf	Description 3

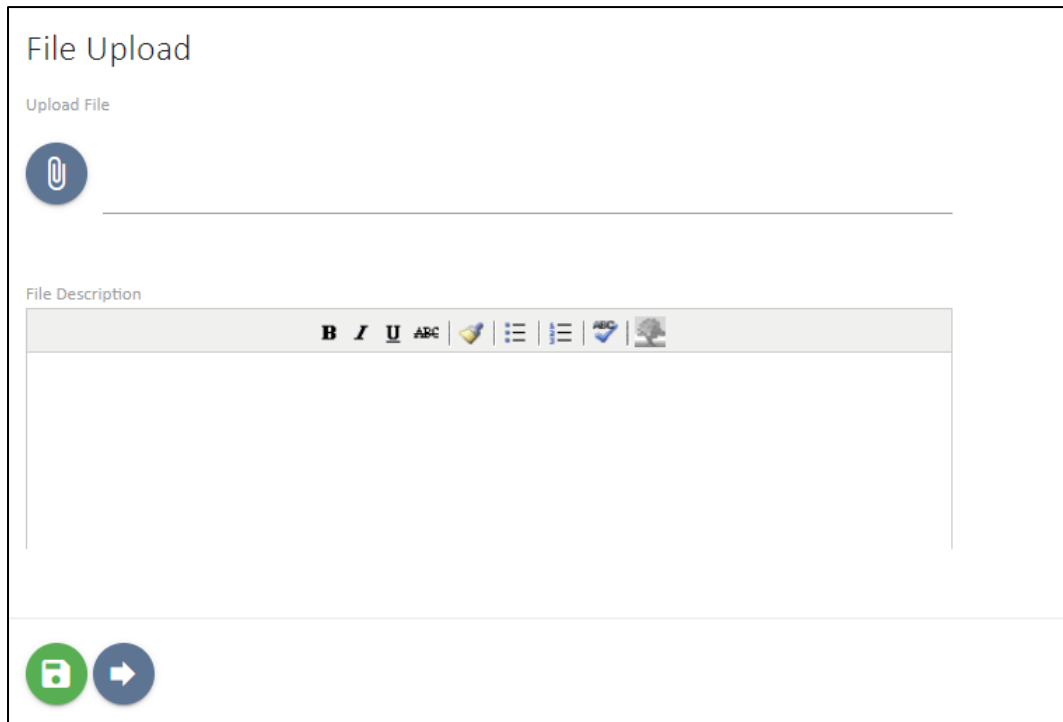


The document template view provides for attaching a default document. This can be used to distribute a standard form or file with the document prepared from this template.

Document Edit View

The document edit view displays an option to browse to the authors file storage i.e. C:\ or a networked drive using a standard browse window.

The selected file will be uploaded from the local storage to the UniPhi server and a file description can also be entered by the author.



The file is uploaded after a Save or Save & Continue option is selected.

The document is shown as already attached. If a new document is selected the existing one will be dropped from the list and the new one will replace it. This is a single attachment option.

Each file has an individual description field for cases where the file name is ambiguous or not descriptive of the content of the file. If the file names are indicative and sufficiently unique for the intended audience of the output document then these descriptions may be left blank.

When editing an existing document with a File Upload (Multi) object the view will appear. If additional files are added to the document or existing files are removed the changes will be displayed within the document as a version control record.

Document Output View

The uploaded file is displayed as a link in the on-screen view or as an attachment in a PDF.

File Upload

Attached File: [4. Budget Template.png](#)

Graph Selector

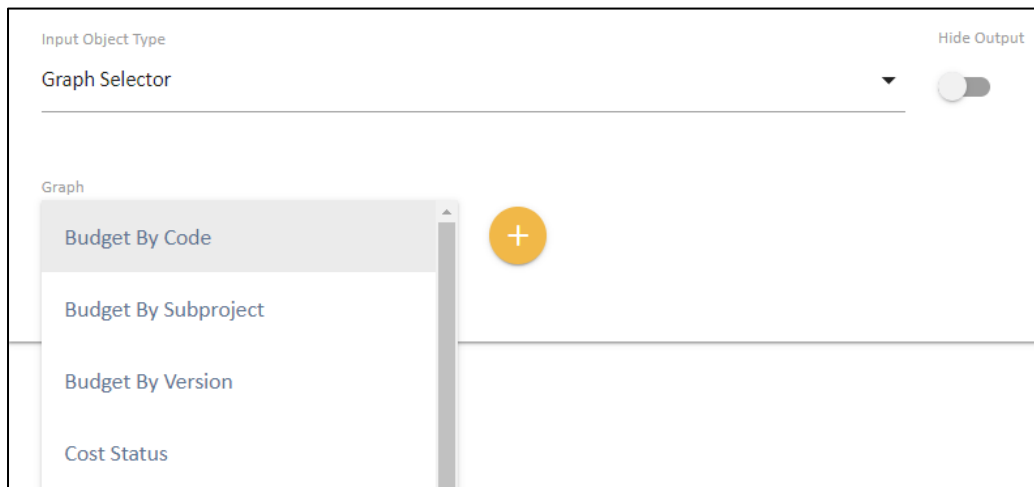
The Graph Selector provides for the inclusion of various charts and graphs based on the data within the UniPhi system. Similar to the charts found on the dashboard screens this object caters for including these charts within documents.

Source of Data


The source of this data is from the statistical and financial information for projects and portfolios in UniPhi.

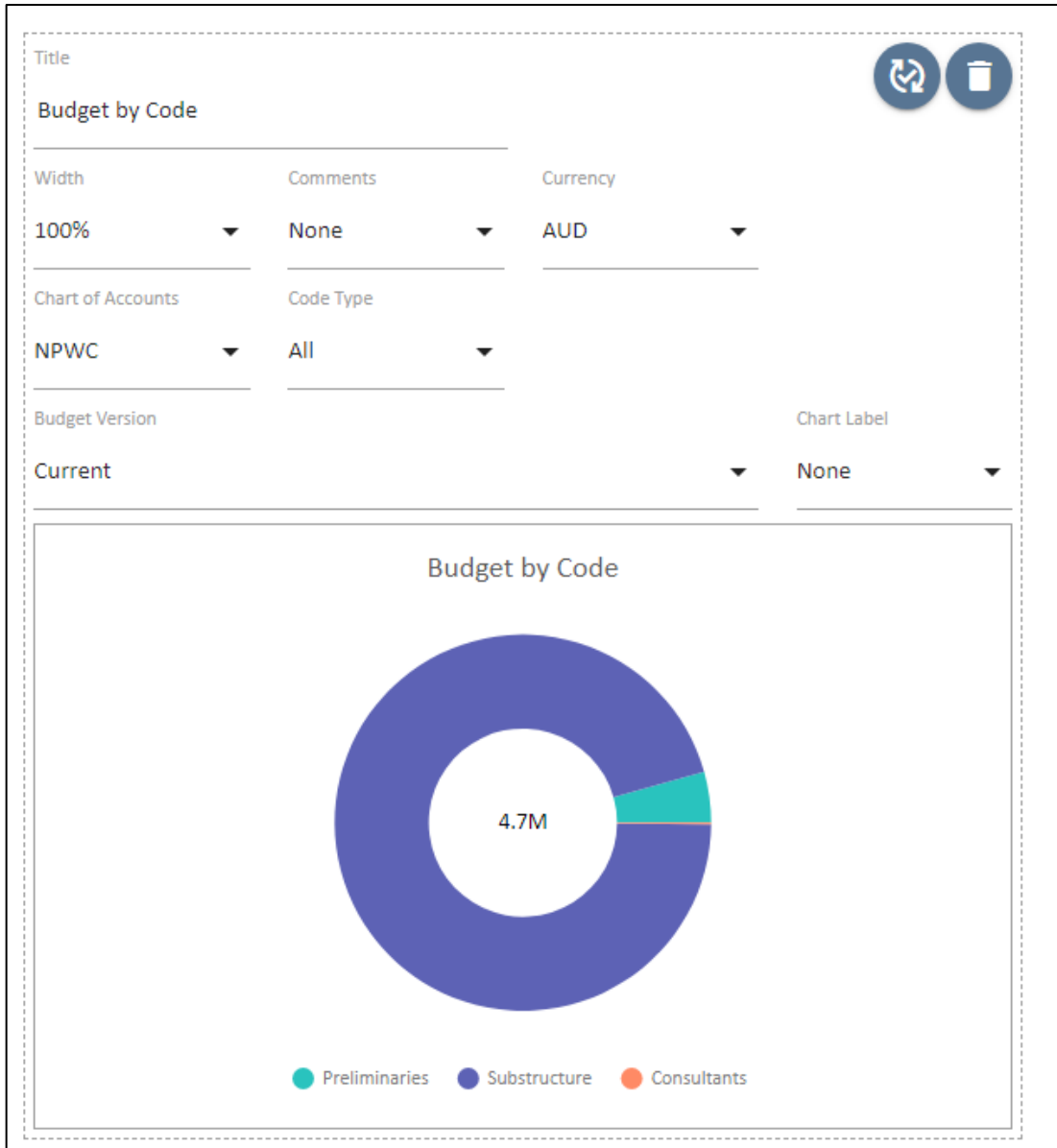
Template View

There are several graphs available. Each draws on information stored within UniPhi. UniPhi graphs have some common features throughout. For example it is possible in most graphs specify the output size as being 50% or 100%, and to include text box commentary. In some cases the graphs are configured as being project specific, while others allow data to be drawn from the entire portfolio. Financial graphs allow you to specify the Chart of Accounts, and whether the graph should display as currency value or as percentages.

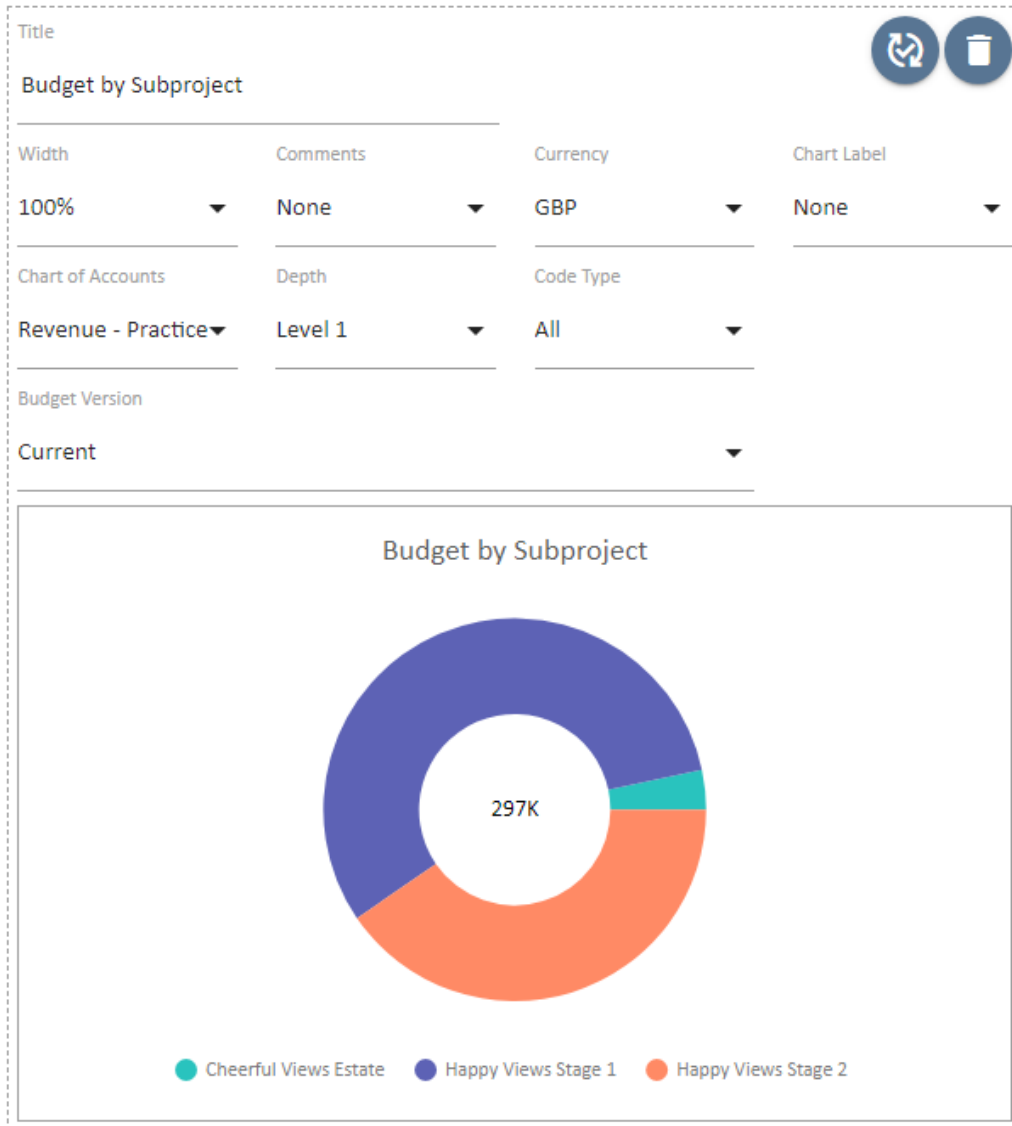


Once you have selected your required graph(s), and press the Add button, your graph will appear. You may add numerous graphs into a single document template step if necessary. Note that the view of the graph at this point is only indicative, and will not reflect the actual graph, or any underlying data from UniPhi.

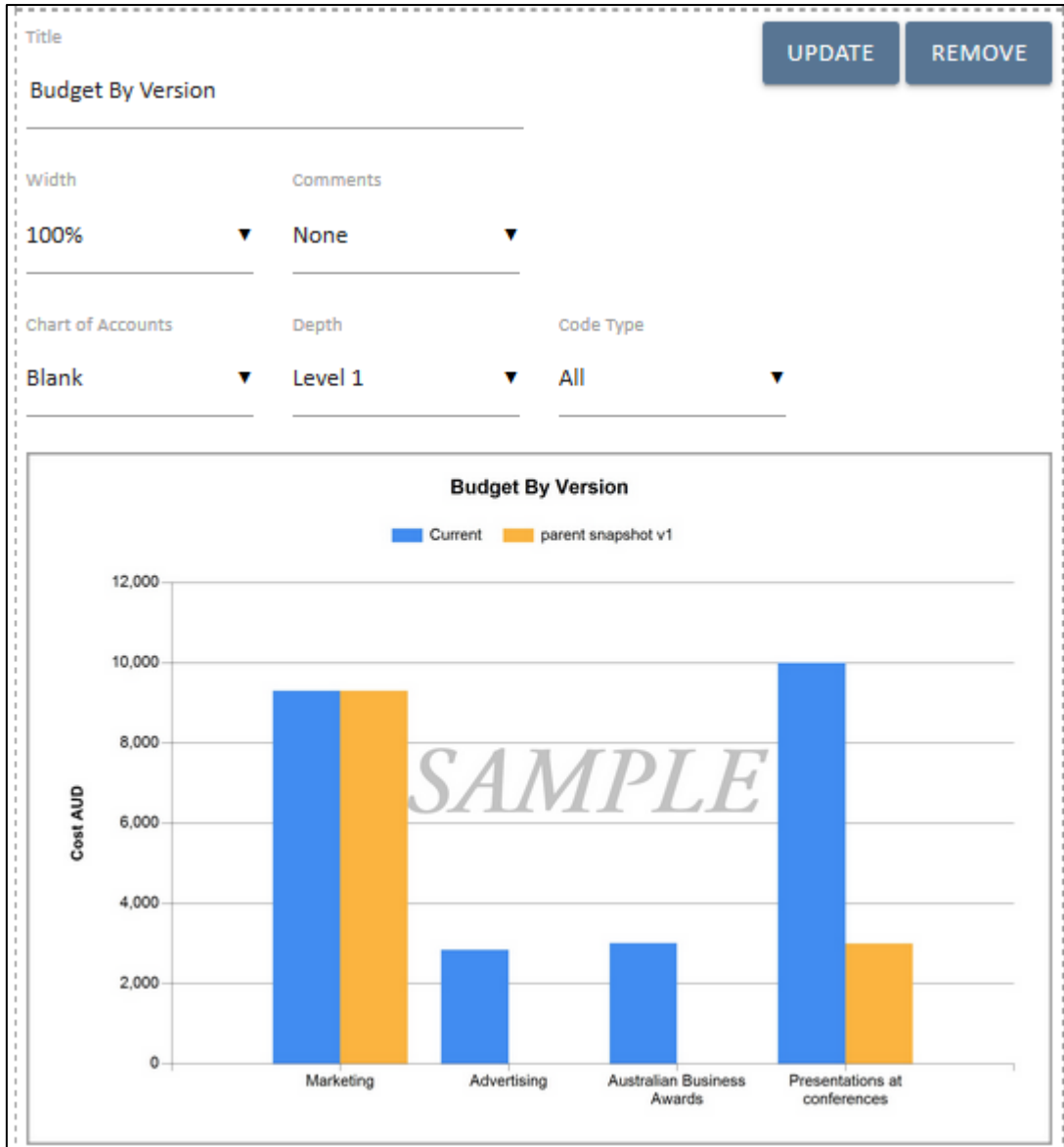
As your graph options are selected, it is important to press the Update  button to commit your changes.



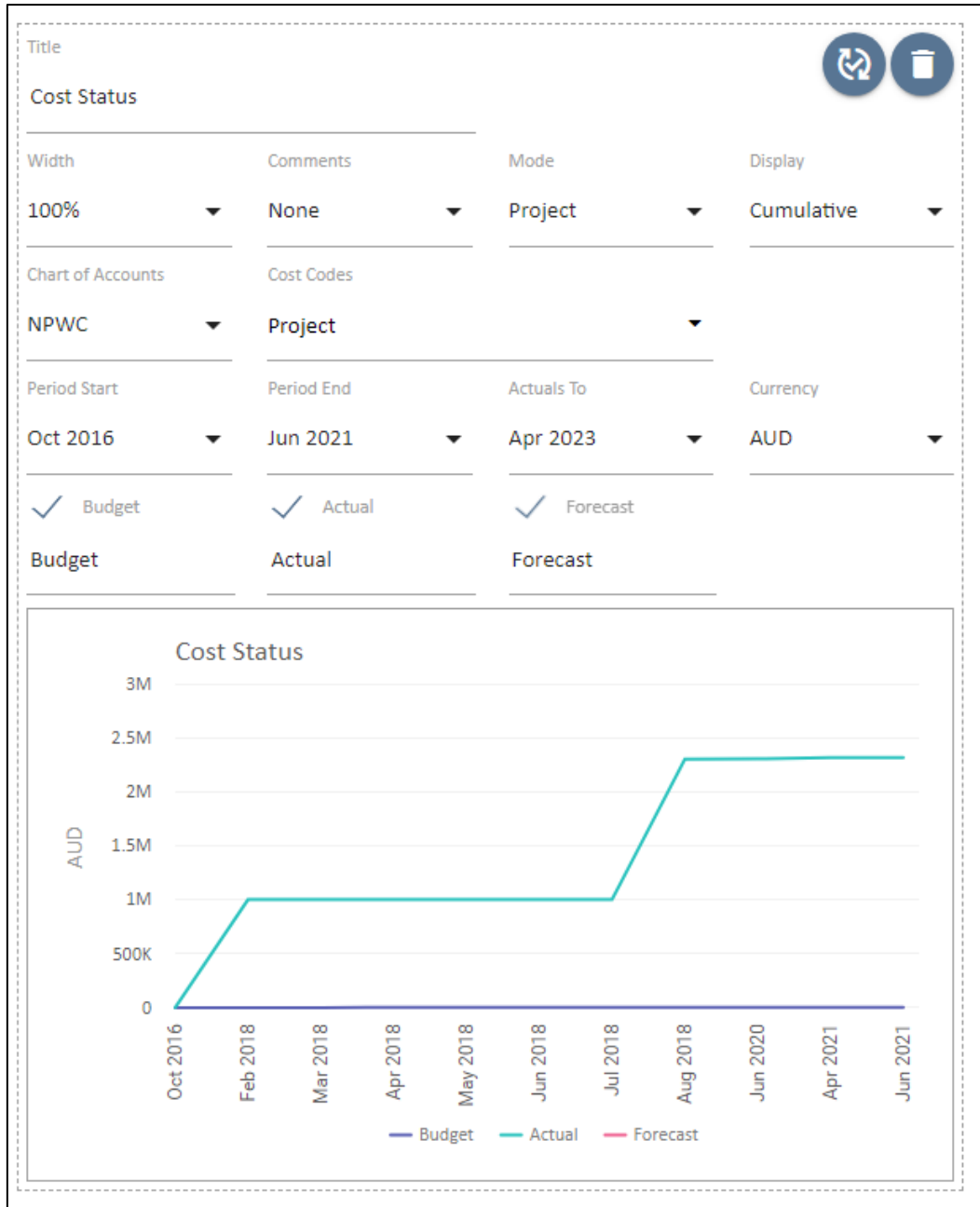
***Budget by Code** – draws information specific to a single project and per project budget chart of accounts*



Budget by Subproject – is only used at a parent project level, where sub project (or child projects) have been created. Data is drawn from the budget information which has been captured as a budget “snapshot”.





Budget By Version – is used to compare budget snapshot versions.



Cost Status – Draws on cost budget, actual spend, and forecasted cost information

Title

Fee Status

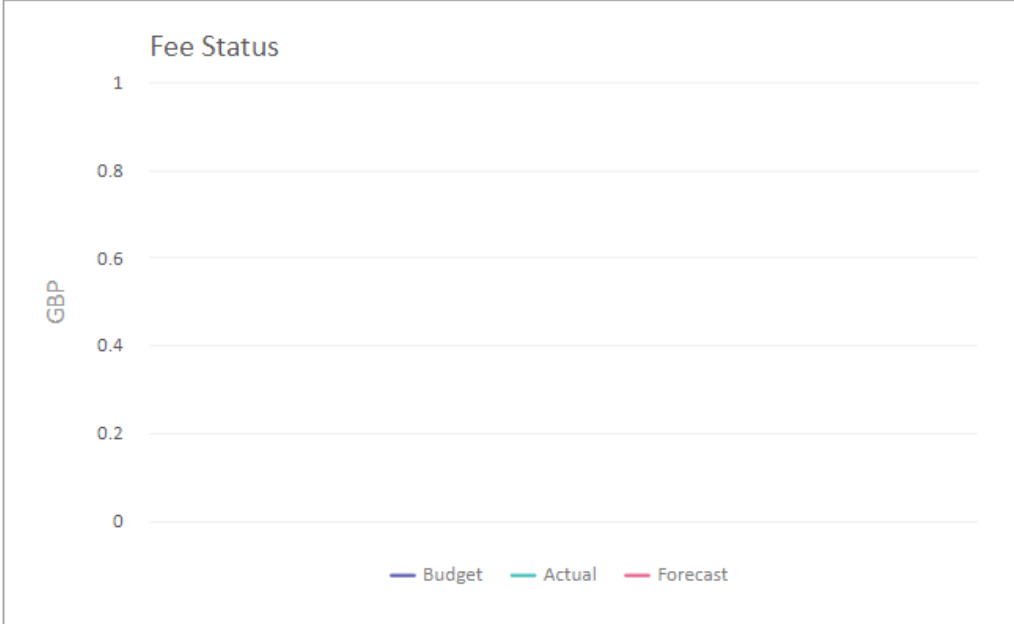
Width	Comments	Mode	Display
100% ▼	None ▼	Project ▼	Cumulative ▼

Chart of Accounts	Revenue Codes
Aged Care ▼	Project ▼

Period Start	Period End	Actuals To	Currency
Jun 2019 ▼	Feb 2048 ▼	Apr 2020 ▼	GBP ▼

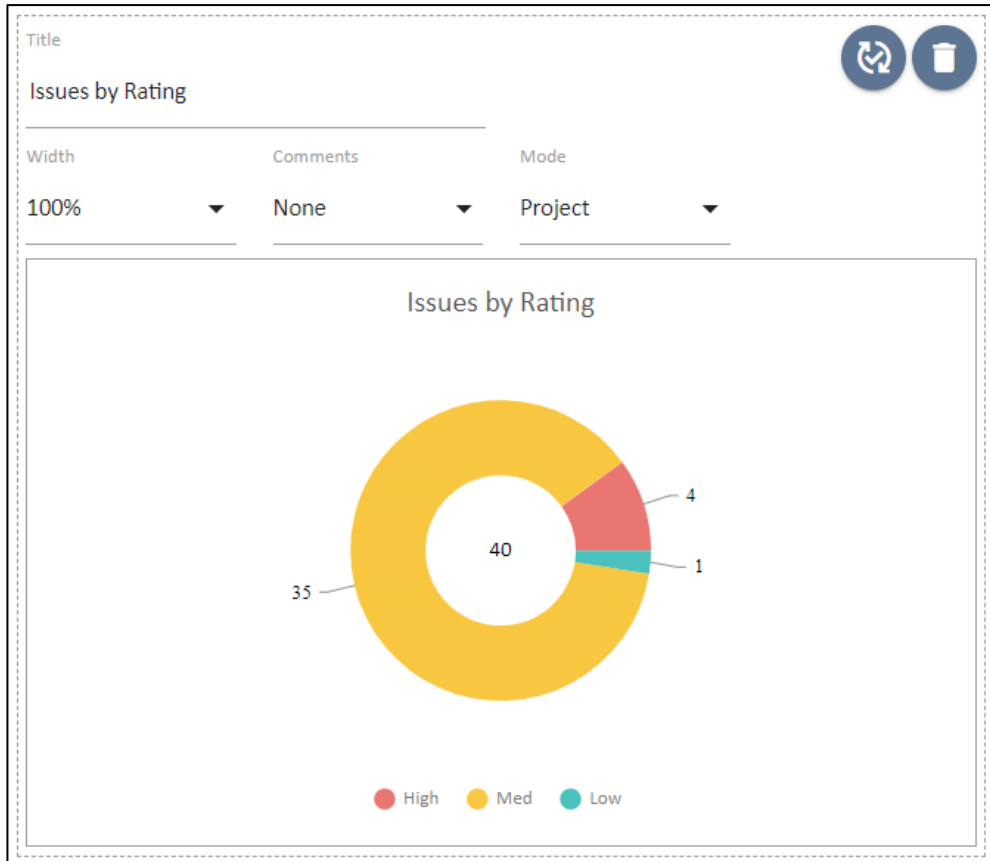
<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/> Actual	<input checked="" type="checkbox"/> Forecast
Budget	Actual	Forecast

Fee Status

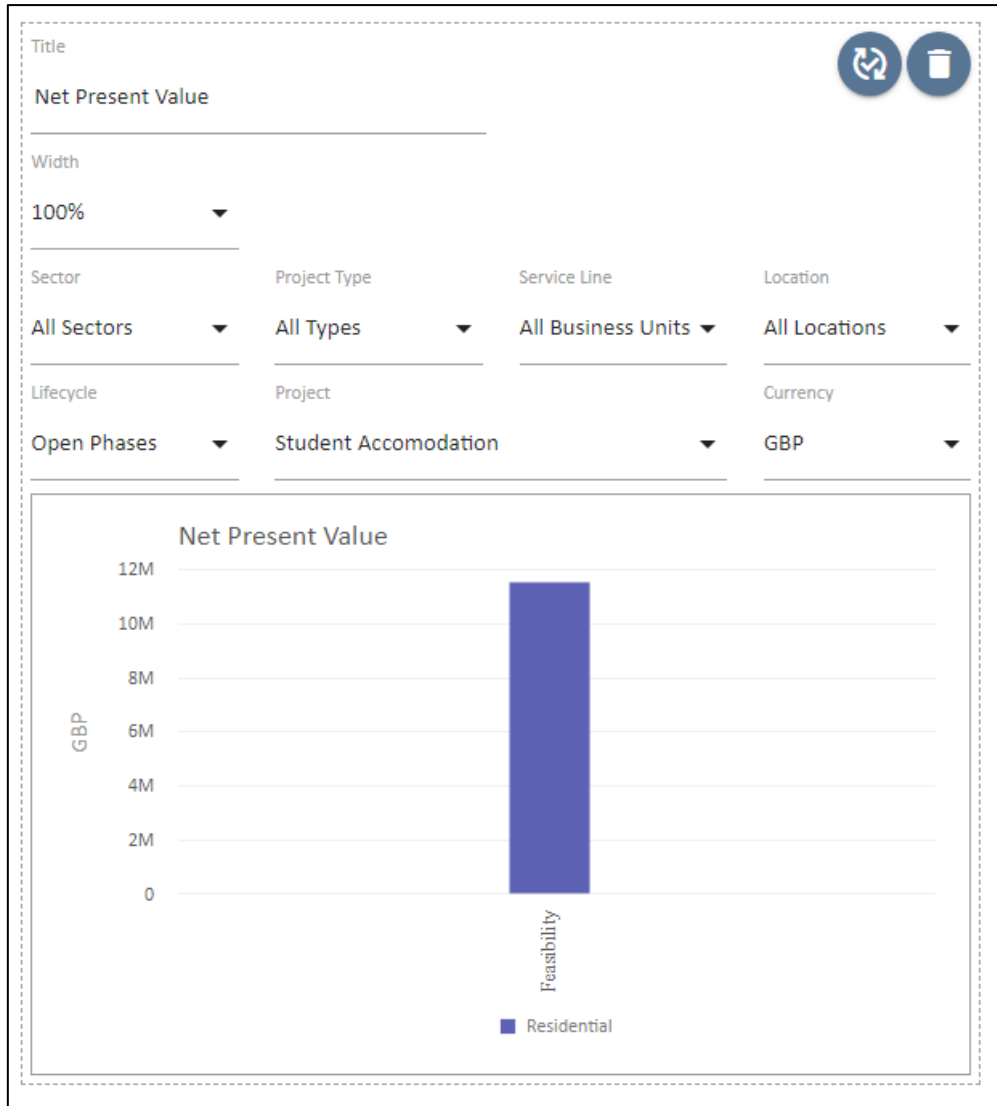


— Budget
 — Actual
 — Forecast

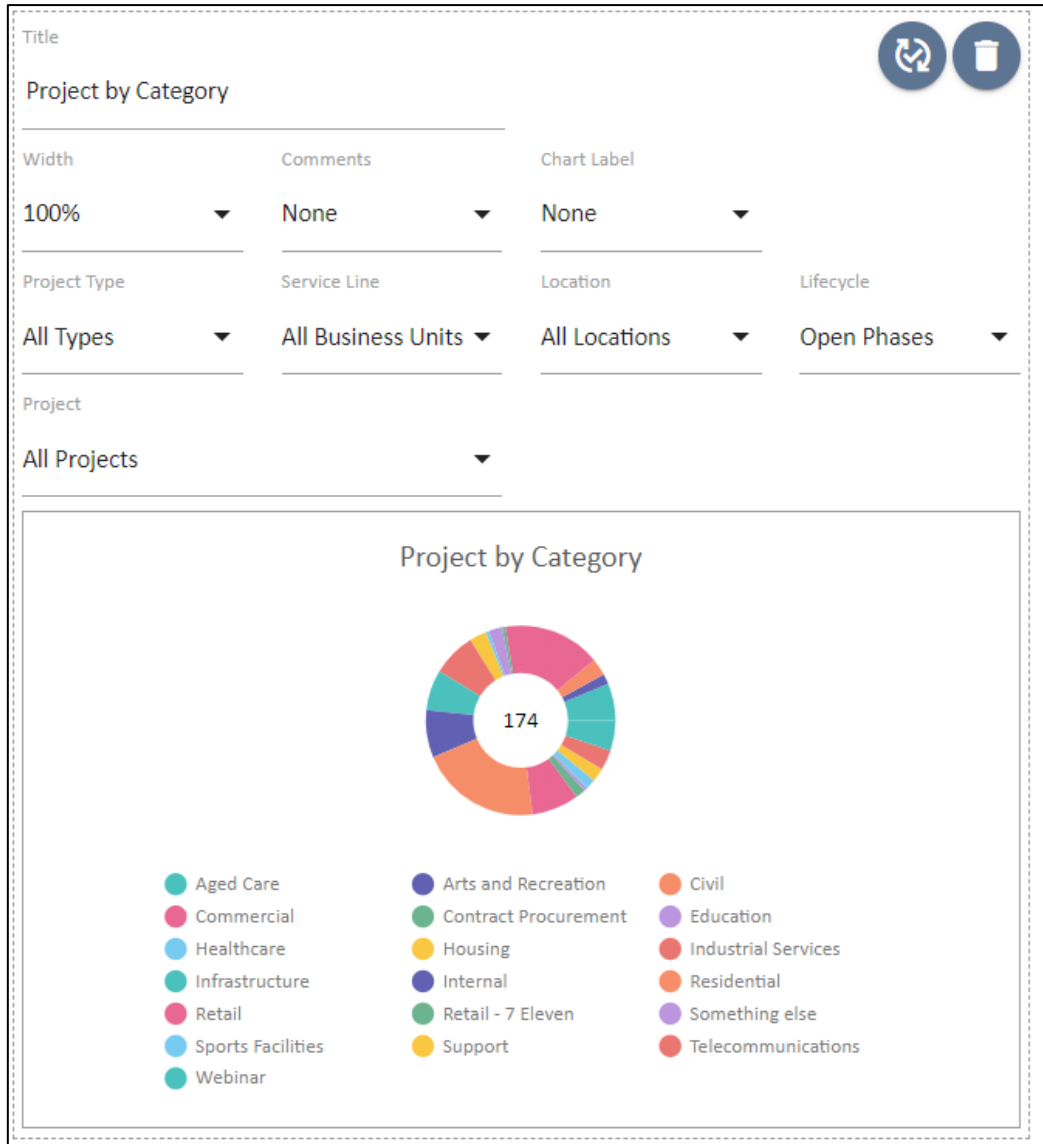
***Fee Status** - Draws on fee budget, actual income, and forecasted fee information*



Issue by Rating – Draws on issues data such as the High / Medium / Low rating of risks according a single project, or across the entire portfolio



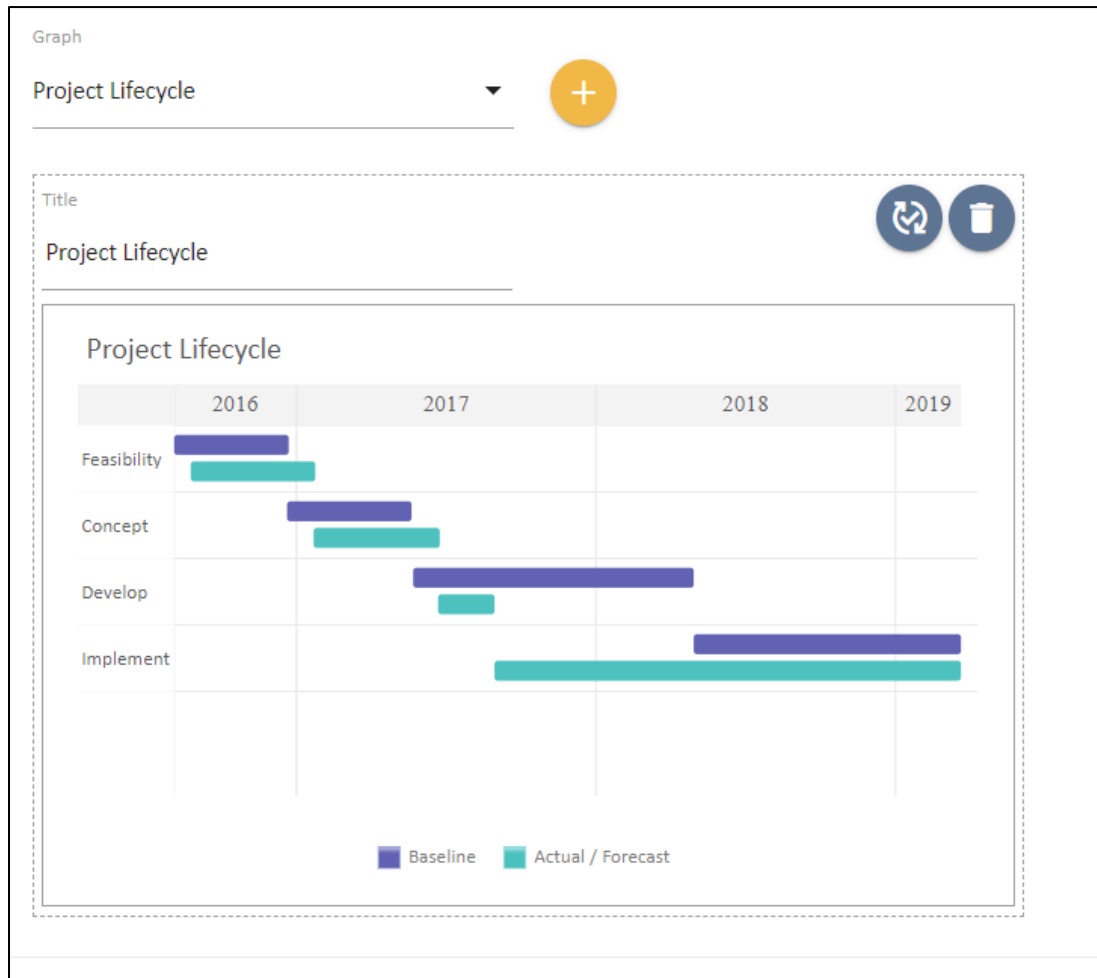
Net Present Value – displays NPV information per the project selected



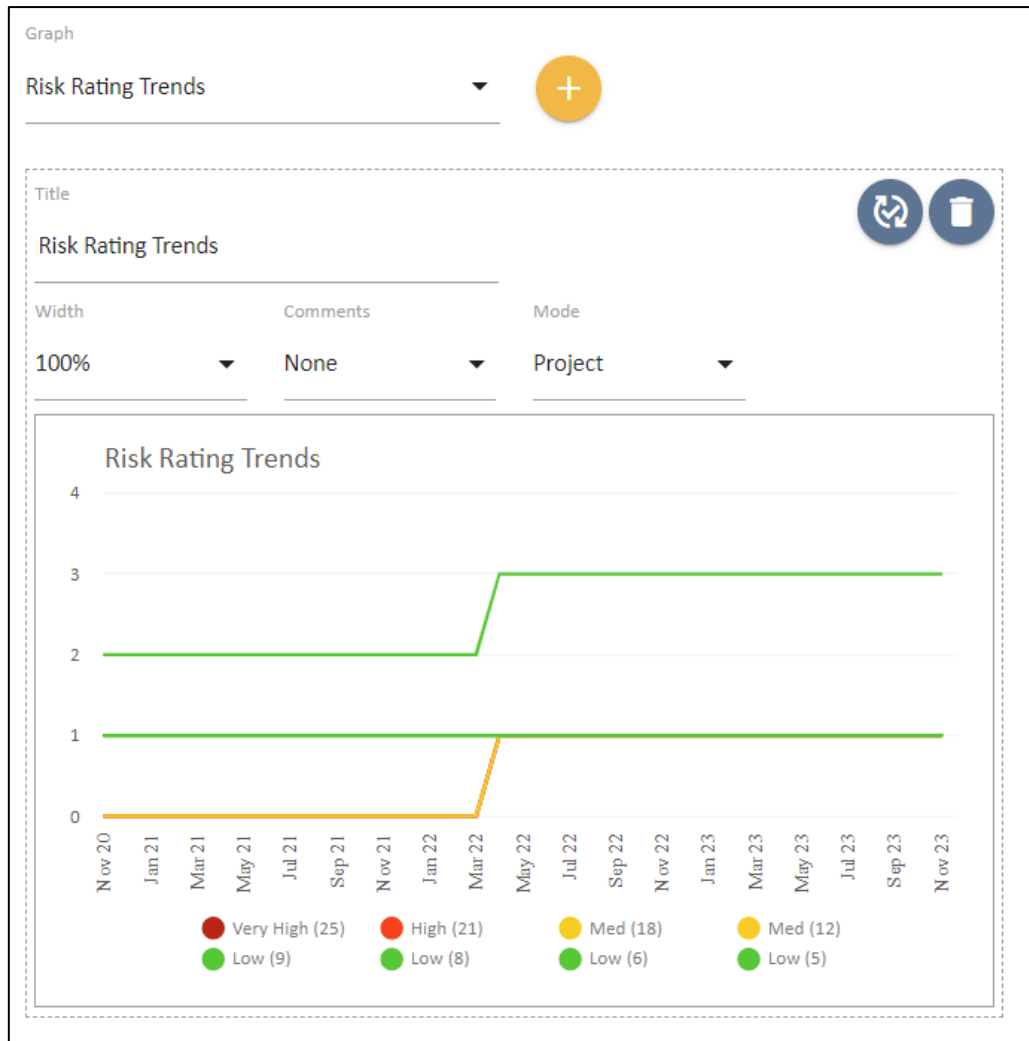
***Project by Category** – Is a portfolio level graph which displays the percentage of projects per category.*



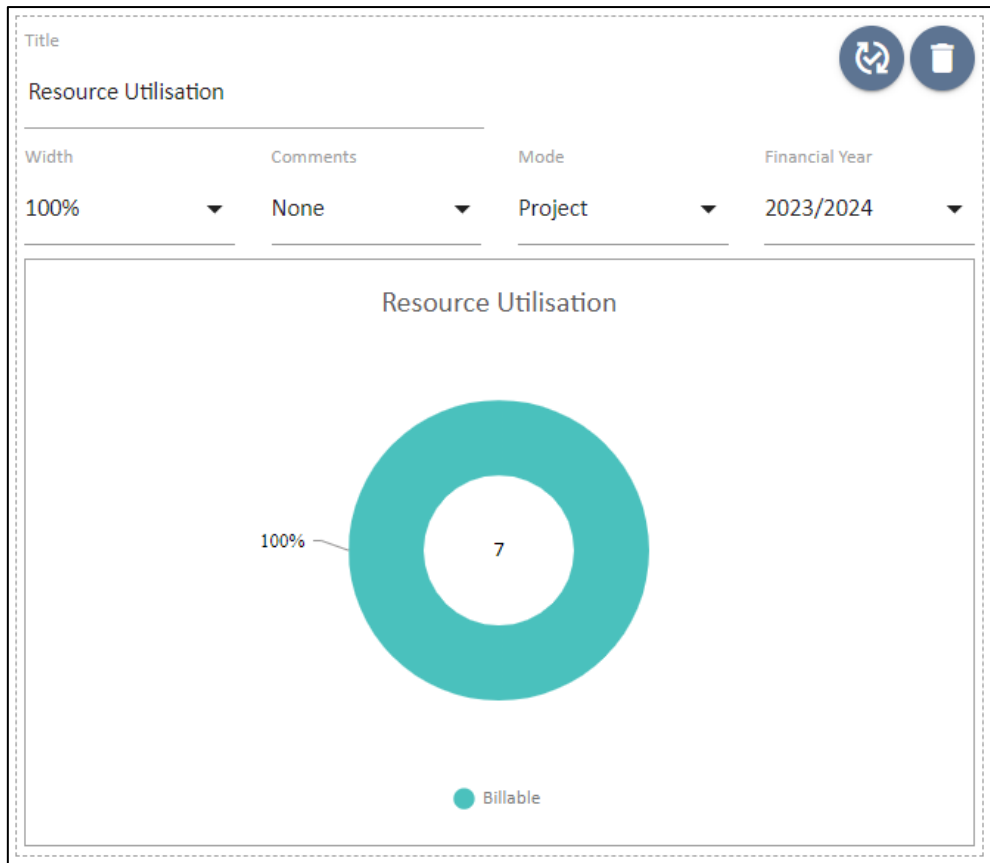
Projects by Type – shows the percentage breakup of projects across the portfolio according to their specific type



Project Lifecycle – displays at a portfolio level, all projects according to their current lifecycle phase.



Risk Rating Trends – displays at a project or portfolio level the changes to risk status. It allows for analysis at a glance as to how risk ratings are increasing or decreasing in severity



Resource Utilisation – Displays the amount of time entered into the timesheet system for all resources. The information is displayed according to the configuration of your timesheets (e.g. billable versus non-billable)

Removing a graph can be done with the red delete icon to the right of the graph placement area.

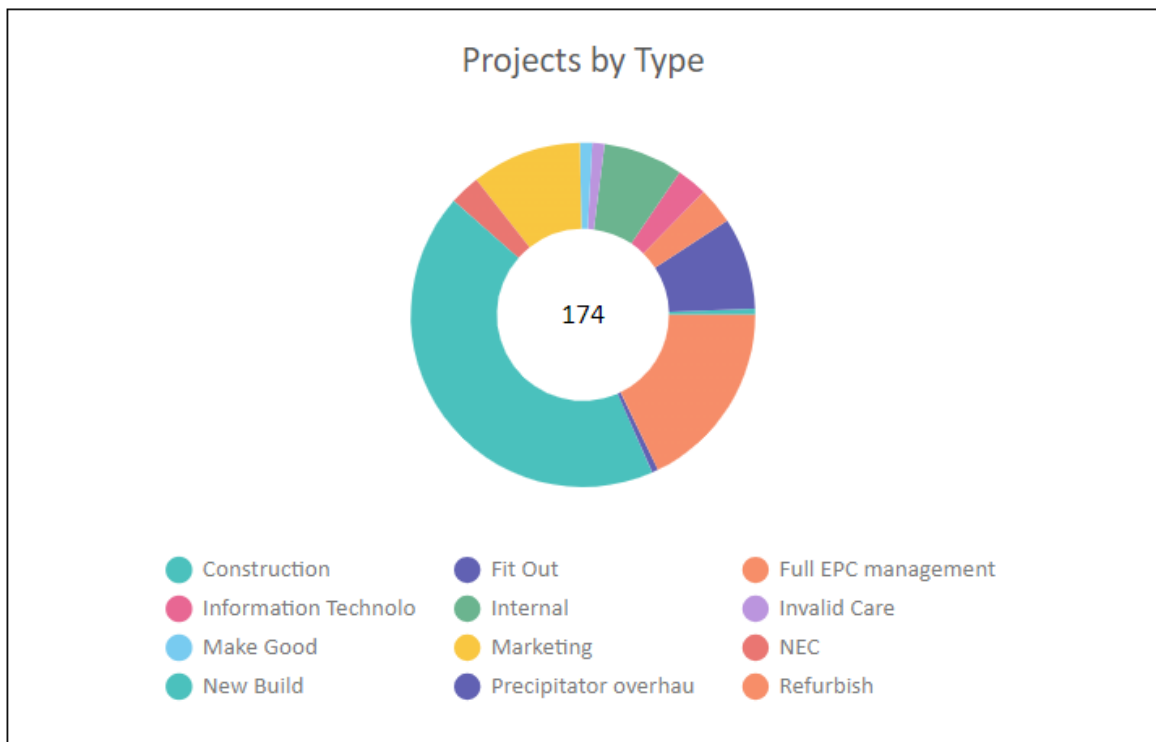
Document Edit View

The user experience will differ depending on the graph that is being displayed. In all cases though the title of the graph can be changed, comments made, and sized changed from 50% to 100%. It is also possible for the author to add new graphs by simply pressing the Add button.

Document Output View

Again, depending on the particular graph that has been selected, and the configuration options which have been specified, the output graph will differ. It is possible to view your graphs in both html view and as a PDF document.

Graph Selector



Invoice

The Invoice object is used with Revenue contracts to generate a client invoice.

Balancing Invoices are also prepared using this object and are used where the invoice is not required to be sent to your accounting software.

Source of Data

The source of this is the Contract Claim values and principal resource information for a Revenue Contract on a project.

Template View

When preparing an invoice template there are several configuration options available.

Input Object Type Hide Output

Invoice ▼

Balancing Invoice ⓘ

Show Contracts From
Selected Project and its Subprojects ▼ ⓘ

Show Project Details <input type="checkbox"/> ⓘ	Allow Marking An Invoice As Paid <input checked="" type="checkbox"/> ⓘ	Show Unpaid Invoices <input type="checkbox"/> ⓘ	Edit Line Item Descriptions <input type="checkbox"/> ⓘ
Show Customer Address <input checked="" type="checkbox"/> ⓘ	Customer Address Label Bill To <input type="text"/> ⓘ	Show Both Customer and Care Of Address <input type="checkbox"/> ⓘ	

Balancing Invoice - As the explanatory text states, a balancing invoice will not be issued with an invoice number and will not be exported via the accounting system interface (if one is used). The purpose of a balancing invoice is to align the values in the UniPhi system with the relevant finance system.

Select View – Two view options are available. The Standard view presents a tabular format of all deliverable and claim values. The Expanded view shows the same table as the standard view but also provides summary additional information such as disbursement values, original contract sum, and adjusted contract values.

Show Address Details – UniPhi will detect the address details of the Principal on the contract and include this information on the output document

Allow Marking An Invoice As Paid – Allows the document author to specify that the invoice they are creating has already been paid

Document Edit View

When editing an invoice document it is generally launched from the Contract Claim screen and there is an expectation that the claim information has already been prepared on that screen and saved.

Select Customer: Blake Lewis (Stowe) | Select Contract(s): Apartment Sale (Active, \$0.00)

Invoice Date: 12/11/2023 | Due Date: 12/12/2023

Claim No: 1 | Column Layout: Time & Materials | Depth: All | Show Project Details: | Invoice Paid:

<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Item	<input type="checkbox"/> Ref	<input checked="" type="checkbox"/> Qty	<input checked="" type="checkbox"/> Unit	<input checked="" type="checkbox"/> Rate	<input checked="" type="checkbox"/> This Claim
Apartment sale						
<input checked="" type="checkbox"/>	Historical Assignment		0	Apt	\$750,000.00	\$0.00
<input checked="" type="checkbox"/>	Historical Assignment		0	Apt	\$750,000.00	\$0.00
<input checked="" type="checkbox"/>	Historical Assignment		0	Apt	\$750,000.00	\$0.00
<input checked="" type="checkbox"/>	Concept Design		0	Hours	\$250.00	\$0.00
Grand Total						\$0.00
Total						\$0.00
Less Payment Made						\$0.00
Total Outstanding						\$0.00

The default contract selection will be based on the contract that the document was started from.

Tax is automatically calculated based on the Tax Rates set in the system.

The Invoice Date is a mandatory field. The Due Date is automatically calculated based on the Contract header Payment Terms field. Both of these fields can be adjusted via the calendar tool or by manually entering a date to the field.

Invoice Date: 12/11/2023 | Due Date: 12/12/2023

Claim No: 1 | Column Layout: **Time & Materials** | Depth: All | Show Project Details:

All Item Ref

Apartment sale

The Column Layout provides options for the display of the line items and will default to the most appropriate for the data being presented. However this can be changed to another layout if desired.

The Invoice Paid option used where the client has already made the payment and this document is being processed for documentation purposes. The balance of the invoice is assumed to have been paid and the Total Outstanding is reduced to zero.

Individual deliverable items can be shown or removed from view. Each column heading may also be renamed, and removed from view.

Document Output View

Outputs can be viewed as html, or PDF. Their appearance will resemble the example below.

Invoice

Claim No: 1 **Invoice Date:** 12 Nov 2023

Invoice No: <Generated on document signoff> **Due Date:** 12 Dec 2023

Bill To:
 Stowe
 Attention: Blake Lewis
 6 Cunningham Street
 Sydney NSW

Item	Qty	Unit	Rate	This Claim
Apartment sale				
Historical Assignment	0	Apt	\$750,000.00	\$0.00
Historical Assignment	0	Apt	\$750,000.00	\$0.00
Historical Assignment	0	Apt	\$750,000.00	\$0.00
Concept Design	0	Hours	\$250.00	\$0.00
Grand Total				\$0.00
			Total	\$0.00
			Less Payment Made	\$0.00
			Total Outstanding	\$0.00

Optimum Construction Pty Ltd Tax Number 1235 8972
 BSB 012-34575 Acc 9998658
 Please quote Invoice no on EFT payments
 Email remittance to Info@optimum.com.au



Invoice numbers are only ever added after the invoice document is signed-off in UniPhi.

The number sequence should be consistent with the Invoice numbering system in the finance system if it is interfaced with UniPhi and all invoices should be issued from UniPhi.

Issue Details

The Issue Details object provides for a listing of filtered issues for the project or portfolio including listing the Actions within the Issues and assignment details. Parent and Child projects can be 'rolled-up' with this object.

Source of Data

The source of this data is the Issues system for the project or portfolio.

Template View

The Template Mode option can be set to cover a single project, or the entire portfolio. In the example below the Issue Details will display only issues for the relevant project. Note that available filters will allow you to specify which project issues are displayed, according to your defined issues categories, escalation, their status, rating, and action status.

Input Object Type
Hide Output

Issue Details

Template Mode


Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Category	Escalated To	Status	Rating
All	All	All	All
Action Status	Bearing	Floor Level	Drawing type
All	All	All	All
Presentation	RFI Source	Software lifecycle	Type
All	All	All	All
Type	Code Impacted		
All	All		

198 | Page

Open In Period From _____ Open In Period To _____



Issue	Rating	Assigned To	Status	Due Date	Date Closed
Issue Description 1					
<u>Actions:</u> <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					
Issue Description 2					
<u>Actions:</u> <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					
Issue Description 3					
<u>Actions:</u> <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					

When viewing Issue Details at the portfolio level, the available filters are expanded so as to allow you to select project criteria such as sector, type, service line, and location.

Template Mode	Sector	Project Type	Service Line
Portfolio	All Sectors	All Project Types	All Service Lines
Location	Lifecycle		
All Locations	Open Phases		
Data will be returned across all projects contained in the selected project filters			
Category	Escalated To	Status	Rating
All	All	All	All
Action Status	Bearing	Floor Level	Drawing type
All	All	All	All
Presentation	RFI Source	Software lifecycle	Type
All	All	All	All
Type	Code Impacted		
All	All		

Document Edit View

When creating a document with the Issues Detail object the filters can be used as per the template setting or adjusted to suit the audience.

Open In Period From _____ Open In Period To _____



<input checked="" type="checkbox"/> Issue	Rating	Assigned To	Status	Due Date	Date Closed
<input checked="" type="checkbox"/> All					
<input checked="" type="checkbox"/> Thing that needs to be done will cost more money	Med		Open		
<input checked="" type="checkbox"/> 1234	Med		Open		
<input checked="" type="checkbox"/> Test	Med		Open		
<input checked="" type="checkbox"/> Equipment delivery delay dispute	Med		Open		
<input checked="" type="checkbox"/> Powerpoint	Med		Open		
<input checked="" type="checkbox"/> Design review	Med		Open		
<input checked="" type="checkbox"/> Extra thing that needs money spent	Med		Open		
Approvals					
<input checked="" type="checkbox"/> Do something to the excel file	Med	Clint Martin	Open	16 Jul 2020	
Defects Management					
<input checked="" type="checkbox"/> Concrete foundations need to be re-poured.	Med		Open		
<input checked="" type="checkbox"/> Change taps to be gold	Med		Open	26 Aug 2022	
Actions:					
<input checked="" type="checkbox"/> Do Something		Jeremy Roberts	Open	26 Aug 2022	

The Column headings of Issue, Rating, Assigned To, Completed and Due Date can be modified, and also clicked to change the sort order of the listing.

The check boxes to the left can be used to include or exclude particular issues.

Document Output View

The on-screen and PDF views of the Issue Details list including the Actions

Issue Selector

The Issue Selector provides for the selection of a single issue. It is used to connect a document with an Issue so that record management, particularly of Issue responses, is completed with visibility of the associated documents listed in the Issue details.

Source of Data

The source of this data is the Issues system for the project or portfolio.

Template View

The Issue Selector objects provides two filter options that can be set in the template but overridden in the document if required.

Input Object Type Hide Output

Issue Selector ▼

Category Escalated To Include Actions

All ▼ All ▼ ⓘ

Will allow the user to select which issue this document relates to

Document Edit View

This step will present all issues within the relevant project displayed according to the filter category and escalation settings

Issue Selector ⚙️

Step Title

Issue Selector

Page Orientation Page Break Hide Output

Portrait ▼ None ▼

Category Escalated To Select Existing Issue

All ▼ All ▼ None Ⓛ

Include Actions

ⓘ

+ ISSUE

Selected Issues

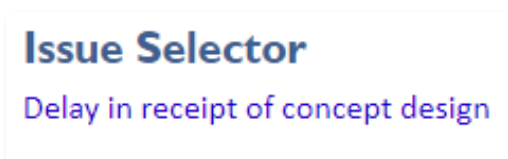
📄 ➡ ✕




Clicking on an Issue in the Select Issue dropdown will link this document to that Issue in the Related Documents panel.

Clicking the add button will launch the UniPhi Issue creation pop up and allow you to create a new issue from within the document template. Once created, the issue and the document will be linked to each other.

Document Output View

The output view is the Issue description which is also a link to the issue. When opening the issue by clicking the link, you will notice the document appears as a “related document”



☰ Summary Documents Issues Risks Time Revenue Costs Feasibility Contracts Resources Communication Timesheets Dashboards  						
All Projects						
REGISTER WORKFLOWS						
		Category All		Assigned To All		Status Open
<input type="checkbox"/>	Project ID	Project Name	Priority	Category	No	Issue
<input type="checkbox"/>	2879	Mirvac Retail Cherrybrook Village Shopping Centre	20	RFI - Client	7	Soil Contamination
<input type="checkbox"/>	1408	Mirvac Program	15	Design	4	Review attached design drawings
<input type="checkbox"/>	17522	Coffee Machine Upgrade 200 Queen St Melbourne	0	Programme	1	Equipment didnt arrive on time - main works start has been delayed 2 days
<input type="checkbox"/>	17523	Foyer upgrade 60 Collins St Melbourne	0	WHS	5	Fire due to electrical failure on site

Issue Summary

The Issue Summary object provides for a listing of filtered issues for the project or portfolio as a high level summary. Unlike the Issue Details object the Summary excludes listing the Actions within the Issues. Parent and Child projects can be 'rolled-up' with this object.

Source of Data

The source of this data is the Issues system for the project or portfolio.

Template View

There are two views based on the Template Mode option.


This example is set for the Project view of the options.

Input Object Type: Issue Summary Hide Output

Template Mode: Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Category	Escalated To	Status	Rating
All	All	All	All
Action Status	Bearing	Floor Level	Drawing type
All	All	All	All
Presentation	RFI Source	Software lifecycle	Type
All	All	All	All
Type	Code Impacted		
All	All		



Category	Issue	Rating	Assigned To	Due Date

While the Portfolio view is selected in this example.

Template Mode	Sector	Project Type	Service Line
Portfolio	All Sectors	All Project Types	All Service Lines
Location	Lifecycle		
All Locations	Open Phases		

Data will be returned across all projects contained in the selected project filters

Category	Escalated To	Status	Rating
All	All	All	All
Action Status	Bearing	Floor Level	Drawing type
All	All	All	All
Presentation	RFI Source	Software lifecycle	Type
All	All	All	All
Type	Code Impacted		
All	All		

The primary difference is that the Portfolio view presents the Portfolio filter selection options as well as the Issue filters.

Document Edit View

When creating a document with the Issues Detail object the filters can be used as per the template setting or adjusted to suit the audience.

Issue summary



Category	Escalated To	Status	Rating
All	All	All	All
Action Status	Software lifecycle	Type	Type
All	All	All	All
Code Impacted			
All			



Category	Issue	Rating	Assigned To	Due Date
<input checked="" type="checkbox"/>	Thing that needs to be done will cost more money	Med		
<input checked="" type="checkbox"/>	1234	Med		
<input checked="" type="checkbox"/>	Test	Med		
<input checked="" type="checkbox"/>	Equipment delivery delay dispute	Med		
<input checked="" type="checkbox"/>	Powerpoint	Med		
<input checked="" type="checkbox"/>	Design review	Med		
<input checked="" type="checkbox"/>	Extra thing that needs money spent	Med		
<input checked="" type="checkbox"/>	Delay in receipt of concept design	Med		
<input checked="" type="checkbox"/> Approvals	Do something to the excel file	Med	Clint Martin	16 Jul 2020
<input checked="" type="checkbox"/> Defects Management	Gyrock crack found next to aircon duct	Med		

The Column headings of Issue, Rating, Assigned To, Completed and Due Date can be clicked to change the sort order of the listing.

The check boxes to the left can be un-checked to exclude a particular issue.

Document Output View

The on-screen and PDF views of the Issue Summary list is a simpler format than the Issues Details listing as it does not present the issue action information.

Category	Issue	Rating	Assigned To	Due Date
	Thing that needs to be done will cost more money	Med		
	1234	Med		
	Test	Med		
	Equipment delivery delay dispute	Med		
	Powerpoint	Med		
	Design review	Med		
	Extra thing that needs money spent	Med		
	Delay in receipt of concept design	Med		
Approvals	Do something to the excel file	Med	Clint Martin	16 Jul 2020
Defects Management	Gyrock crack found next to aircon duct	Med		
Defects Management	XXX defect	Med		
Defects Management	Concrete foundations need to be re-poured.	Med		
Defects Management	Change taps to be gold	Med		26 Aug 2022
Design	Material required to meet design requirements has a long lead procurement time and will delay completion	Med		
Design	Design review abc	Med		
Design	Stage 2 Review with Project Team	High		

Metrics

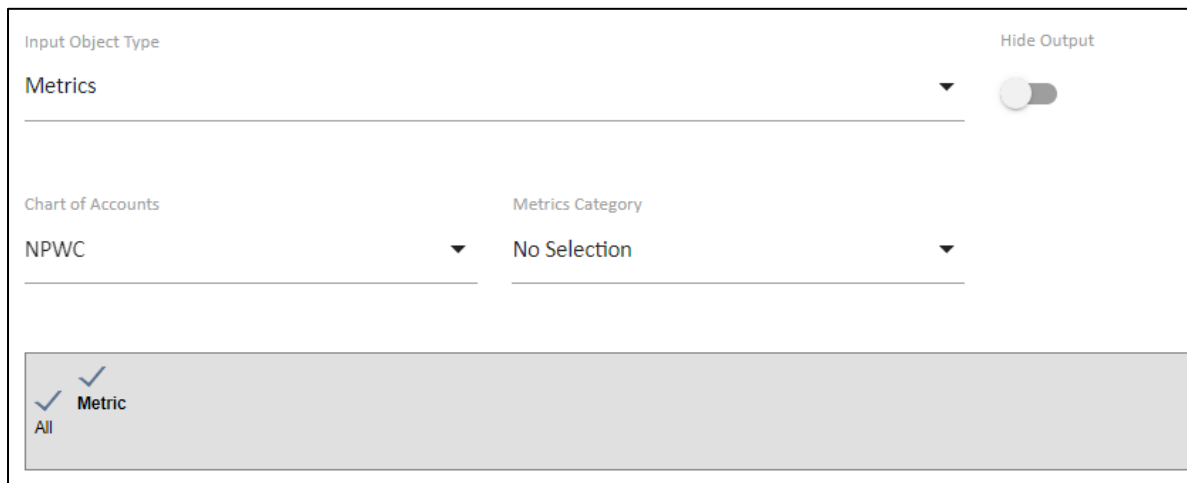
Metrics are used to present budget calculations based on the metrics defined by your organisation.

Source of Data

Metrics data is drawn from the metrics and metrics categories which are defined within the budget of your projects. Metrics are linked to chart of accounts so as to provide a standard structure for metric calculation. In the example below, two categories have been created, and several metric calculations have also been created. When a project budget is created, these defined metrics appear beneath the budget details.

Template View

The template allows you to select the chart of accounts where your metrics calculations have been defined, and the specific metrics that you wish to include in you document. Note that multiple metric categories may be selected



The screenshot shows a web interface for configuring metrics. At the top left, there is a dropdown menu labeled "Input Object Type" with "Metrics" selected. To the right of this dropdown is a "Hide Output" toggle switch, which is currently turned off. Below this, there are two more dropdown menus: "Chart of Accounts" with "NPWC" selected, and "Metrics Category" with "No Selection" selected. At the bottom of the interface, there is a list of metrics with checkboxes. The "All" checkbox is checked, and the "Metric" checkbox is also checked.

Document Edit View

The document author is presented with each of the metrics which have been defined within the budget, and selected in the template design. Additional metrics may be selected, and budget versions can be added for comparison purposes. Metrics may be selectively shown or hidden, and column headings may be changed if necessary.

Metrics ⚙️

Chart of Accounts: NPWC Metrics Category: None, Benchmark Ratios, Sense Checks Currency: GBP

Version: Current Compare To: None

Metric	Current
✓ All	
✓ Wall to Floor	
✓ Floor Count	
✓ FECA	
✓ Gross Floor Area	
✓ Area/floor	
✓ Budget	£2,672,110
✓ \$/m2 FECA	
✓ \$/m2 GFA	

Document Output View

The output document closely resembles the view displayed when the document is being created. Note that column headings have been amended, and the metrics which were removed from view are not displayed in the output document.

Metric	Current
Wall to Floor	
Floor Count	
FECA	
Gross Floor Area	
Area/floor	
Budget	£2,672,110
\$/m2 FECA	
\$/m2 GFA	
Dumb one	
GFA	
Roof : Floor	
External Doors : Floor	
Sanitary Fixtures : Floor	
External Wall : Floor	
Window : Floor	
Finished floor compared to FECA	
Wall area to be finished	4,852
Wall area to finishes comparison	148
Floors compared to FECA	
Substructure cost rate	
Superstructure cost rate	

Monthly Updates

Template View

Open In Period From _____ Open In Period To _____



Issue	Rating	Assigned To	Status	Due Date	Date Closed
Issue Description 1					
Actions: <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					
Issue Description 2					
Actions: <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					
Issue Description 3					
Actions: <ul style="list-style-type: none"> Action 1 Action 2 Action 3 					

Document Edit View

Monthly Updates

Period

Nov 2023 ▼



Metric	Nov 2023	To Date	Comments
✓ All			
✓ Revenue target per month (\$)			<input type="text"/>
✓ LTI (No.)			<input type="text"/>
✓ Reportable (No.)			<input type="text"/>
✓ Minor (No.)			<input type="text"/>
✓ Cat baits laid outside fence (No.)			<input type="text"/>
✓ Cat trapping - sites outside fence (No.)			<input type="text"/>
✓ Cat trapping - effort outside fence (trap nights) (No.)			<input type="text"/>
✓ Cat spotlighting - sites outside fence (No.)			<input type="text"/>
✓ Qualified Enquiries			<input type="text"/>
✓ First Inspections			<input type="text"/>
✓ Sold Reserved			<input type="text"/>



Monthly Updates

Metric	Nov 2023	To Date	Comments
Revenue target per month (\$)			
LTI (No.)			
Reportable (No.)			
Minor (No.)			
Cat baits laid outside fence (No.)			
Cat trapping - sites outside fence (No.)			
Cat trapping - effort outside fence (trap nights) (No.)			
Cat spotlighting - sites outside fence (No.)			
Qualified Enquiries			
First Inspections			
Sold Reserved			

Net Budget

In instances where your project is responsible for cost and revenue budgets, it is convenient to be able to view the net budget position in a reportable format.

Source of Data

Net budget relies on budget information from both the Cost and Fees tabs. If you have created budget snapshots, you may compare cost and fee per budget snapshot versions.

Template View

The template allows you to select the focus on being at a per project, or portfolio level. The template also allows you to determine which Chart of accounts is to be used by default, and the depth level that will be displayed.

Input Object Type Hide Output

Net Budget ▼

Template Mode

Project ▼

Data will be returned for the project the document is created in (including child project if created in a parent project)

Revenue Codes Depth

Aged Care Level 4

Cost Codes Depth

Aged Care Costs Level 3

Document Edit View

The document author is presented with similar options to the template designer. IE, they can choose the change the chart of accounts, and the depth level displayed. They can also choose budget versions to use for comparison purposes, and can change the column headings if required.

Revenue Codes	Depth	Code Format	Currency
Revenue - Practise	Level 3	Code - Description	GBP
Version			
Current			
Cost Codes	Depth		
Aged Care Costs	Level 3		
Version			
Current			

Current					
Code	Qty	Unit	Rate	Total	%
4-1000 - Cost Management				105,800.00	36%
4-1100 - Cost Planning	60	hours	1,113.33	66,800.00	22%
4-1200 - Post Contract	120	hours	325.00	39,000.00	13%
4-2000 - Project Management Services				145,100.00	49%
4-2100 - Post Contract	400	hours	262.50	105,000.00	35%
4-2200 - Planning				40,100.00	14%
4-3000 - Engineering Services	100	hours	110.00	11,000.00	4%
4-4000 - Maintenance				35,000.00	12%
Total Revenue				296,900.00	100%
Net Budget				296,900.00	

Document Output View

The document output will correspond with the settings made during the document creation.

Net Budget

Currency: GBP

Code	Current				Total	%
	Qty	Unit	Rate			
4-1000 - Cost Management					105,800.00	36%
4-1100 - Cost Planning	60	hours	1,113.33		66,800.00	22%
4-1200 - Post Contract	120	hours	325.00		39,000.00	13%
4-2000 - Project Management Services					145,100.00	49%
4-2100 - Post Contract	400	hours	262.50		105,000.00	35%
4-2200 - Planning					40,100.00	14%
4-3000 - Engineering Services	100	hours	110.00		11,000.00	4%
4-4000 - Maintenance					35,000.00	12%
Total Revenue					296,900.00	100%
Net Budget					296,900.00	

Net Project Costs

Source of Data

Template View

Input Object Type: **Net Project Costs** Hide Output

Revenue Codes: **Aged Care** Depth: **Level 4** Code Format: **Description**

Cost Codes: **Aged Care Costs** Depth: **Level 3**

	Budget			Commitments		
	<input type="checkbox"/> Cost Code	<input type="checkbox"/> Original Budget	<input type="checkbox"/> Transfers	<input type="checkbox"/> Approved Budget	<input type="checkbox"/> Original Contract	<input type="checkbox"/> Approved Variations

Document Edit View

Revenue Codes		Depth	Code Format	Currency
Revenue - Practice		Level 3	Description	GBP
Cost Codes		Depth	Last Forecast Document	
Aged Care Costs		Level 3		

Cost Code	Budget			Commitments			Possible Vari
	Original Budget	Transfers	Approved Budget	Original Contract	Approved Variations	Committed	
Cost Management	£0	£55,000	£55,000	£497,700	£0	£497,700	£0
Cost Planning	£0	£40,000	£40,000	£497,700	£0	£497,700	£0
Post Contract	£0	£15,000	£15,000	£0	£0	£0	£0
Project Management Services	£20,000	£5,000	£25,000	£2,452,000	£0	£2,452,000	£0
Post Contract	£10,000	£15,000	£25,000	£20,000	£0	£20,000	£0
Planning	£10,000	(£10,000)	£0	£2,432,000	£0	£2,432,000	£0
Engineering Services	£0	£11,000	£11,000	£15,000	£0	£15,000	£0
Maintenance	£0	£35,000	£35,000	£12,750	£0	£12,750	£0
Total Revenue	£20,000	£106,000	£126,000	£2,977,450	£0	£2,977,450	£0
Total Cost	£0	£0	£0	£0	£0	£0	£0
Net Total	£20,000	£106,000	£126,000	£2,977,450	£0	£2,977,450	£0

Document Output View

Net Project Costs

Cost Code	Budget			Commitments			Uncommitted
	Original Budget	Transfers	Approved Budget	Original Contract	Approved Variations	Committed	Pending Contract
Cost Management	£0	£55,000	£55,000	£497,700	£0	£497,700	£0
Cost Planning	£0	£40,000	£40,000	£497,700	£0	£497,700	£0
Post Contract	£0	£15,000	£15,000	£0	£0	£0	£0
Project Management Services	£20,000	£5,000	£25,000	£2,452,000	£0	£2,452,000	£0
Post Contract	£10,000	£15,000	£25,000	£20,000	£0	£20,000	£0
Planning	£10,000	(£10,000)	£0	£2,432,000	£0	£2,432,000	£0
Engineering Services	£0	£11,000	£11,000	£15,000	£0	£15,000	£0
Maintenance	£0	£35,000	£35,000	£12,750	£0	£12,750	£0
Total Revenue	£20,000	£106,000	£126,000	£2,977,450	£0	£2,977,450	£0
Total Cost	£0	£0	£0	£0	£0	£0	£0
Net Total	£20,000	£106,000	£126,000	£2,977,450	£0	£2,977,450	£0

Periodic Issue Count by Category/ Location

This object provides statistical information relating to Issues for the selected period, and as a cumulative total covering the duration of the project.

Source of Data

The source of this data is the Issues system for the project or portfolio. More specifically, it is the issue category selections which appear within the individual issues per project. Issue categories are created according to the needs of each organisation within the Methodology/Issues tab.

There are two views for this object when preparing a template, and will be used depending on the scope of your requirements. You may view issues at the project level, or across the portfolio. When the Template Mode set to Project you will be presented with the option of filtering on the Issue Category as a default filter for the document edit process.

Input Object Type: Periodic Issue Count by Category Hide Output:

Template Mode: Portfolio | Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines

Location: All Locations | Lifecycle: Open Phases

Data will be returned across all projects contained in the selected project filters

Issue Category: All

Will output a table of issue categories and a count of the number of issues raised in a selected period for each category.

<input type="checkbox"/> Category	<input type="checkbox"/> Issues At Beginning	<input type="checkbox"/> Issues Created Period	<input type="checkbox"/> Issues Closed Period	<input type="checkbox"/> Issues At End	<input type="checkbox"/> Created To Date	<input type="checkbox"/> Avg Days to Respond in Period	<input type="checkbox"/> Avg Days To Respond Overall	<input type="checkbox"/> Comments
^	^	^	^	^	^	^	^	^

Input Object Type: Periodic Issue Count by Location Hide Output:

Template Mode: Portfolio | Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines

Location: All Locations | Lifecycle: All Phases

Data will be returned across all projects contained in the selected project filters

Issue Category: All

Will output a table of issue locations and a count of the number of issues raised in a selected period for each location

<input type="checkbox"/> Location	<input type="checkbox"/> Issues At Beginning	<input type="checkbox"/> Issues Created Period	<input type="checkbox"/> Issues Closed Period	<input type="checkbox"/> Issues At End	<input type="checkbox"/> Created To Date	<input type="checkbox"/> Avg Days to Respond in Period	<input type="checkbox"/> Avg Days To Respond Overall	<input type="checkbox"/> Comments
^	^	^	^	^	^	^	^	^

When the Portfolio Template Mode is selected, the filters for the broader portfolios are made available for setting as defaults.

When editing a document that includes this object, the view will vary dependant on the selections and the configuration of the Issue Custom Fields and Custom Field categories.

The Periodic Issue Count object defaults to Issue Category of All and will display the current relevant financial period.

Periodic Issue Count by Category

Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines | Location: All Locations

Lifecycle: Open Phases | Project: All Projects

Issue Category: All | Period: Oct 2023

<input checked="" type="checkbox"/> Category	<input type="checkbox"/> Open at Oct 2023 Start	<input type="checkbox"/> Created in Oct 2023	<input type="checkbox"/> Closed in Oct 2023	<input type="checkbox"/> Open at Oct 2023 End	<input type="checkbox"/> Created To Date	<input type="checkbox"/> Avg Days to Respond in Oct 2023	<input type="checkbox"/> Avg Days To Respond Overall	<input type="checkbox"/> Comments
✓ All	62	0	0	62	69			
✓ Design	62	0	0	62	69		460	
✓ Financial	22	0	0	22	24		769	
✓ Quality	13	0	0	13	16		102	
✓ WHS	19	0	0	19	21		665	
✓ RFI - Contractor	34	0	0	34	38		413	
✓ Defects Management	39	0	0	39	42		1099	
✓ RFI - Client	15	0	0	15	15			
✓ Insurance	4	0	0	4	4			

Periodic Issue Count by Location

Sector: All Sectors | Project Type: All Project Types | Service Line: All Service Lines | Location: All Locations

Lifecycle: All Phases | Project: All Projects

Issue Category: All | Period: Oct 2023

<input checked="" type="checkbox"/> Location	<input type="checkbox"/> Open at Oct 2023 Start	<input type="checkbox"/> Created in Oct 2023	<input type="checkbox"/> Closed in Oct 2023	<input type="checkbox"/> Open at Oct 2023 End	<input type="checkbox"/> Created To Date	<input type="checkbox"/> Avg Days to Respond in Oct 2023	<input type="checkbox"/> Avg Days To Respond Overall	<input type="checkbox"/> Comments
✓ All	1	0	0	1	1			
✓ 15 Bourke St Melbourne Vic 3000	1	0	0	1	1			
✓ 200 Queen St Melbourne Vic 3000	8	0	0	8	9		951	
✓ 60 Collins St Melbourne Vic 3000	92	0	0	92	103		91	
✓ Adelaide	28	0	0	28	37		282	
✓ Cambridgeshire	3	0	0	3	3			
✓ Central Ward	0	0	0	0	0			
✓ Dublin	0	0	0	0	0			
✓ East Ward	2	0	0	2	2			

The data is presented for the period selected, and for the whole of project to the end of the selected period. Selecting a specific category changes the view to include any Custom List fields.

Document Output View

The resulting document output is simply the table as viewed in the document creation phase.

Location	Open at Oct 2023 Start	Created in Oct 2023	Closed in Oct 2023	Open at Oct 2023 End	Created To Date	Avg Days to Respond in Oct 2023	Avg Days To Respond Overall	Comments
15 Bourke St Melbourne Vic 3000	1	0	0	1	1			
200 Queen St Melbourne Vic 3000	8	0	0	8	9		951	
60 Collins St Melbourne Vic 3000	92	0	0	92	103		91	
Adelaide	28	0	0	28	37		282	
Cambridgeshire	3	0	0	3	3			
Central Ward	0	0	0	0	0			
Dublin	0	0	0	0	0			
East Ward	2	0	0	2	2			
Gateshead	7	0	0	7	7			

Progress Claim

The Progress Claim object provides for documenting and processing of Cost Contracts with Simple Claims set for a project.

Source of Data

The source of this is the Contract supplier information for a Cost Contract on a project, and the amount being claimed against specific contract deliverables.

Template View

The template view provides only for the selection of the Progress Claim object. There are a number of configurable settings which can be applied to this control.

Input Object Type: **Progress Claim** Hide Output

Contract Type

Cost Revenue i

Claim Processing Options

Balancing Claim i Do Not Claim On Signoff i Received Date Required i

Summary Page

Hide Summary i

Claim No i Contractor's Invoice No i Contractor's Invoice i

Contractor's Claim Date i Due Date i

Certification Date i Payment Method i

Original Contract Sum i

Provisional Sum and Prime Cost Total i

Sub Total i


Approved Contract Variations i

Document Edit View

Progress Claim

Hide Summary i Hide Detail i Detail Page Breaks i Detail Pages Orientation: **Portrait**

Select Supplier: **Alex Rose (West Coast Constructions Pty Ltd)** Select Contract(s): **Geotechnical Services (Active, \$0.00)**

Claim No: **1** Contractor's Invoice No: 

Contractor's Claim Date: **12/12/2023** Depth: **All** Payment Method: **None**

Received Date: **12/11/2023**

1. Original Contract Sum	\$30,000.00
2. Provisional Sum and Prime Cost Total	\$0.00
3. Sub Total (1 + 2)	\$30,000.00
4. Approved Contract Variations	\$0.00
5. Adjusted Contract Sum (3 + 4)	\$30,000.00
6. Pending Contract Variations	\$0.00
7. Total Value of Contract Work Completed to Date	\$0.00

The Select Contract option allows for selection of the relevant contract. The Certification date, and Contractors Claim date are both mandatory fields. The Tax value is automatically calculated based on the Tax settings in the Admin area and should not be changed without administration approval.

Document Output View

The output view includes an auto-incremented Claim number and the details as set in the document creation phase.

Progress Claim	
Claim No:	1
Contractor's Claim Date:	14 Nov 2023
Due Date:	14 Dec 2023
Certification Date:	12 Nov 2023
1. Original Contract Sum	\$30,000.00
2. Provisional Sum and Prime Cost Total	\$0.00
3. Sub Total (1 + 2)	\$30,000.00
4. Approved Contract Variations	\$0.00
5. Adjusted Contract Sum (3 + 4)	\$30,000.00
6. Pending Contract Variations	\$0.00
7. Total Value of Contract Work Completed to Date	\$0.00
8. Total Value of Variations Completed to Date	\$0.00
9. Total Certified to Date (ex tax) (Certified Payments) (7 + 8)	\$0.00
10. Less Total Value Previously Certified (Certified Payments)	\$0.00
11. This Payment Now Certified (9 - 10)	\$0.00
12. Tax on This Payment	\$0.00
13. Total This Payment (inc tax) (11 + 12)	\$0.00



The Claim No: value is controlled by the number of documents issued within the selected project. If documents are created but left in private mode the claim number will still be allocated to that document and any claim should be validated for the correct issuing sequence before sign-off.

A template that uses the Progress Claim object will automatically appear in the Related Templates panel within the contract

Progress Claim Appendix

Source of Data

Template View

Input Object Type: Progress Claim Appendix Hide Output

Include: Deliverable Depth: All Deliverable Status: All

Chart of Accounts: NPWC Code: All

Deliverable

<input type="checkbox"/> Deliverable	<input type="checkbox"/> Ref	<input type="checkbox"/> Code	<input type="checkbox"/> Amount	<input type="checkbox"/> Previously Claimed	<input type="checkbox"/> This Claim	<input type="checkbox"/> Value Complete	<input type="checkbox"/> Assessment	%

Document Edit View

Progress Claim Appendix ⚙️

Include: Deliverable, Variations, Unfixed Materials, Claim Adjustments Depth: All Deliverable Status: All

Variation Status: All Code: All

Deliverable

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Document Output View

Project Costs

The Project Costs object is designed simply as a data presentation tool.

Source of Data

The data source is the Cost system values for the relevant project.

Details are changed within the relevant Cost Project Budget screens before inclusion in a document.

Template View

The object control features numerous columns, and is designed to allow you full control and configurability over the desired output that you require. Each of the columns can be selectively shown or hidden by default when the template is used. Column headings may also be changed if

required. The control also allows you to specify the default chart of accounts structure and depth level. Finally, you can also choose to display the costs as code, description, or code-description.

Input Object Type: Project Costs Hide Output

Cost Codes: NPWC Code: Project Depth: Level 3 Code Format: Description Group Header

Cost Code	Budget			Commitments			Pending Contract	Possible Vari
	Original Budget	Transfers	Approved Budget	Original Contract	Approved Variations	Committed		

Document Edit View

By default, each of the selection options will be set at the template level by the administrator. If for any reason these selection options need to change, the document creator can make any necessary adjustments

Project Costs ⚙️

Chart of Accounts: NPWC Code: Project Depth: Level 3 Code Format: Description

Currency: GBP Last Forecast Document: Nov 2023

Cost Code	Budget			Commitments			Pending Contract	Possible Vari
	Original Budget	Transfers	Approved Budget	Original Contract	Approved Variations	Committed		
Preliminaries	£86,637,271	(£74,588,956)	£12,048,315	£0	£0	£0	£0	
Substructure	£147,690,368	(£142,107,965)	£5,582,403	£0	£0	£0	£0	
Superstructure	£166,508,246	(£49,148,899)	£117,359,346	£0	£0	£0	£0	
Columns (Framed Buildings)	£4,097,833	(£3,923,287)	£174,546	£0	£0	£0	£0	
Upper Floors	£2,711,624	(£2,348,581)	£363,043	£0	£0	£0	£0	
Staircase	£46,002,744	(£1,417,917)	£44,584,826	£0	£0	£0	£0	
Roof	£1,746,752	(£1,421,881)	£324,871	£0	£0	£0	£0	
External Walls	£2,334,583	£116,550	£2,451,133	£0	£0	£0	£0	

Document Output View

The output document will reflect document edit view, based on the selections that were made.

Project Costs

Cost Code	Budget			Commitments			Uncommitted				Contingency	Total			Expenditure			
	Original Budget	Transfers	Approved Budget	Original Contract	Approved Variations	Committed	Pending Contract	Possible Variations	Pending Variations	Untendered Variations	Total Uncommitted	Remaining Contingency	Forecast	Variance to Budget	Variance to Last Forecast	Expenditure To Date	Remaining Expenditure	Total Expenditure
Preliminaries	£86,637,271	(£74,588,956)	£12,048,315	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£12,048,315		£0	£0	£0
Preliminaries	£86,637,271	(£74,588,956)	£12,048,315	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£12,048,315		£0	£0	£0
Substructure	£147,690,368	(£142,107,965)	£5,582,403	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£5,582,403		£0	£0	£0
Substructure	£147,690,368	(£142,107,965)	£5,582,403	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£5,582,403		£0	£0	£0
Superstructure	£166,508,246	(£49,148,899)	£117,359,346	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£117,359,346		£0	£0	£0
Columns (Framed Buildings)	£4,097,833	(£3,923,287)	£174,546	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£174,546		£0	£0	£0
Upper Floors	£2,711,624	(£2,348,581)	£363,043	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£363,043		£0	£0	£0
Staircase	£46,002,744	(£1,417,917)	£44,584,826	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£44,584,826		£0	£0	£0
Roof	£1,746,752	(£1,421,881)	£324,871	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£324,871		£0	£0	£0
External Walls	£2,334,583	£116,550	£2,451,133	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£2,451,133		£0	£0	£0
Windows	£1,406,467	(£574,492)	£831,975	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£831,975		£0	£0	£0
External Doors	£44,346,401	(£2,146,003)	£42,200,398	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£42,200,398		£0	£0	£0
Internal Walls	£1,890,550	(£1,397,189)	£493,361	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£493,361		£0	£0	£0
Internal Screens and Borrowed Lights	£472,747	(£191,715)	£281,032	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£281,032		£0	£0	£0
Internal Doors	£61,498,545	(£35,844,383)	£25,654,162	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£25,654,162		£0	£0	£0
Finishes	£1,580,031	(£1,363,671)	£216,360	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£216,360		£0	£0	£0
Wall Finishes	£447,864	(£373,557)	£74,308	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£74,308		£0	£0	£0
Floor Finishes	£630,563	(£550,426)	£80,137	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£80,137		£0	£0	£0

Project Milestones

Displays project specific milestones, along with their planned and current forecast achievement dates.

Source of Data

Project milestones are sourced from the Project Milestones panel which is found within the summary details of an individual project.

Template View

The template can be configured to display milestones according to the required period, and to display upcoming, completed, or all milestones

Input Object Type Hide Output

Project Milestones

Reporting Period Display

All All Milestones

☰

Milestones	Baseline	Actual	Forecast


Document Edit View

Specific milestones may be included, or removed from view, and the scope of milestones may be changed.



Project Milestones

Reporting Period: All Display: All Milestones

Status Date: 16 Nov 2023



Milestones	Baseline	Actual	Forecast
All			
<input checked="" type="checkbox"/> Tender Bid			
<input checked="" type="checkbox"/> Initial Cost Estimate			
<input checked="" type="checkbox"/> 25% Project Completion			
<input checked="" type="checkbox"/> 50% Project Completion			
<input checked="" type="checkbox"/> 100% Project Completion			

Document Output View

Project Milestones

Milestones	Baseline	Actual	Forecast
Tender Bid			
Initial Cost Estimate			
25% Project Completion			
50% Project Completion			
100% Project Completion			

Risk Details

This object provides for a filtered listing of Risks for the project.

Source of Data

The source of this data is the Risks system for the project.

Template View

The template creation phase allows for a number of options to be selected.

Input Object Type: Risk Details

Hide Output:

Category: All | Status: Open | Rating: All | Escalated To: All

Rating Matrix: Hide Matrix

<input type="checkbox"/> Risk	<input type="checkbox"/> L	<input type="checkbox"/> C	<input type="checkbox"/> Level	<input type="checkbox"/> Assigned To	<input type="checkbox"/> Due Date

These options provide the default settings for the resulting documents but the selections may be changed during the document creation phase.

Document Edit View

The main screen is a table of the Risks listed based on the selected filters.

Risk Details ⚙️

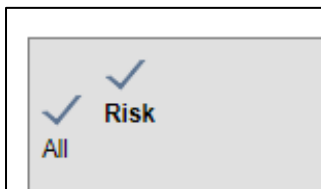
Category: All | Status: Open | Rating: All | Escalated To: All

Rating Matrix: Hide Matrix

<input checked="" type="checkbox"/> Risk	<input type="checkbox"/> L	<input type="checkbox"/> C	<input type="checkbox"/> Level	<input type="checkbox"/> Assigned To	<input type="checkbox"/> Due Date
<input checked="" type="checkbox"/> All Cost <input checked="" type="checkbox"/> New risk for presso Current Assessment Treated Assessment Exposure: \$0.00 Risk Impact Contingency Contingency: \$0.00	L - Unlikely 20-39%	L - Minor	L (Annie Lennox	5/04/2022

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The column headings in the table provide for sorting, using the directional arrows to sort in ascending order while a second click will change to descending order.



While the default settings for the presentation are set in the template they can be changed in the document preparation phase like the option for adding the matrix or not.

Category
Status

All ▼
Open ▼

Rating Matrix
 L

Hide Matrix

Show Before Risks

Show After Risks

Document Output View

The output is the resulting table based on the filters and sort sequences selected in the document preparation phase.

Risk Details					
Risk	L	C	Level	Assigned To	Due Date
Cost					
New risk for presso				Annie Lennox	5/04/2022
Current Assessment	L -	L - Minor	L(
Treated Assessment	Unlikely	L - Minor	L(
Exposure: \$0.00					
Risk Impact	L -				
	Unlikely				
	20-39%				
Contingency					
Contingency: \$0.00					

Source of Data

Template View

Input Object Type: Risk Register Hide Output:

Template Mode: Project

Data will be returned for the project the document is created in (including child project if created in a parent project)

Category: All | Status: Open | Rating: All | Escalated To: All

Rating Matrix: Hide Matrix



Risk	Assigned To	Current Level	Treated Level	Due Date	Status

Document Edit View

Risk Register ⚙️

Category: All | Status: Open | Rating: All | Escalated To: All

Rating Matrix: Hide Matrix



✓ Risk	Assigned To	Current Level	Treated Level	Due Date	Status
✓ All					
✓ poor supplier integration / management	Clint Martin	Low (6)	Very Low (1)	07 Jun 2019	Mitigation (Terminate/Transfer/Treat)
✓ Inaccurate Stage 1 - 25% budget	Bernard Neeson	Med (18)	Low (6)	29 Jul 2016	Accepted (Tolerate)
✓ Inadequate project scoping and scope creep	Jane W Smith	Low (8)	Low (5)	19 Jul 2019	Contingency (post-mitigation)
✓ Resource constraints	Eva Chang	Low (5)	Low (5)	31 Mar 2020	Mitigation (Terminate/Transfer/Treat)
✓ Materials used may not match design	Elaine Bennise	High (21)	Low (9)	07 Sep 2019	Mitigation (Terminate/Transfer/Treat)
✓ Late changes to design by client	Clint Martin	Low (5)	Very Low (1)	16 May 2019	Mitigation (Terminate/Transfer/Treat)
✓ Materials prices increases due to tight supply	Clint Martin	Very High (25)	Low (6)	27 Mar 2020	Mitigation (Terminate/Transfer/Treat)
✓ Significant change to standard leasing contract (currently under review by Westfield)	Jane W Smith	Med (12)	Low (5)	02 Aug 2019	Mitigation (Terminate/Transfer/Treat)
✓ Slow delivery puts pressure on 2019 Budget	Denis Adams	Low (9)	Very Low (3)	29 Oct 2019	Mitigation (Terminate/Transfer/Treat)
✓ Industrial policy changes due to EU exit	Clint Martin	Low (5)	Low (8)	21 Jun 2019	Mitigation (Terminate/Transfer/Treat)

Risk Register

Risk	Assigned To	Current Level	Treated Level	Due Date	Status
poor supplier integration / management	Clint Martin	Low (6)	Very Low (1)	07 Jun 2019	Mitigation (Terminate/Transfer/Treat)
Inaccurate Stage 1 - 25% budget	Bernard Neeson	Med (18)	Low (6)	29 Jul 2016	Accepted (Tolerate)
Inadequate project scoping and scope creep	Jane W Smith	Low (8)	Low (5)	19 Jul 2019	Contingency (post-mitigation)
Resource constraints	Eva Chang	Low (5)	Low (5)	31 Mar 2020	Mitigation (Terminate/Transfer/Treat)
Materials used may not match design	Elaine Bennise	High (21)	Low (9)	07 Sep 2019	Mitigation (Terminate/Transfer/Treat)
Late changes to design by client	Clint Martin	Low (5)	Very Low (1)	16 May 2019	Mitigation (Terminate/Transfer/Treat)
Materials prices increases due to tight supply	Clint Martin	Very High (25)	Low (6)	27 Mar 2020	Mitigation (Terminate/Transfer/Treat)
Significant change to standard leasing contract (currently under review by Westfield)	Jane W Smith	Med (12)	Low (5)	02 Aug 2019	Mitigation (Terminate/Transfer/Treat)
Slow delivery puts pressure on 2019 Budget	Denis Adams	Low (9)	Very Low (3)	29 Oct 2019	Mitigation (Terminate/Transfer/Treat)
Industrial policy changes due to EU exit	Clint Martin	Low (5)	Low (8)	21 Jun 2019	Mitigation (Terminate/Transfer/Treat)

Risk Summary

This object provides for a summary listing of Risks for the project

Source of Data

The source of this data is the Risks system for the project, as seen above for Risk Details.

Template View

The template creation phase allows for a number of options to be selected.

Input Object Type: Risk Summary Hide Output:

Category: All | Status: Open | Rating: All | Escalated To: All

Rating Matrix: Hide Matrix

Current						Treated	
Category	Risk	L	C	Level	Exposure	L	C

These options provide the default settings for the resulting documents but the selections may be changed during the document creation phase.

Document Edit View

The main screen is a table of the Risks listed based on the selected filters.

Category		Status	Rating		Escalated To	
All		Open	All		All	
Rating Matrix						
Hide Matrix						
Current						
Category	Risk	L	C	Level	Exposure	C
Cost	Inaccurate Stage 1 - 25% budget	M - Possible 40-59%	H - Significant	M	\$0.00	M - Moderate
Cost	Materials prices increases due to tight supply	VH - Almost Certain	VH - Major	VH	\$300,000.00	M - Moderate
Cost	Slow delivery puts pressure on 2019 Budget	L - Unlikely 20-39%	M - Moderate	L	\$0.00	L - Minor
Cost	Industrial policy changes due to EU exit	L - Unlikely 20-39%	L - Minor	L	\$0.00	L - Minor
Quality	Materials used may not match design	H - Likely 60-79%	H - Significant	H	\$0.00	M - Moderate
Quality	poor supplier integration / management	VL - Rare <=20%	M - Moderate	L	\$12,500.00	VL - Insignificant
Resource	Resource constraints	L - Unlikely 20-39%	L - Minor	L	\$0.00	L - Minor
Scope	Inadequate project scoping and scope creep	M - Possible 40-59%	L - Minor	L	\$10,000.00	L - Minor
Time / Schedule	Late changes to design by client	L - Unlikely 20-39%	L - Minor	L	\$0.00	VL - Insignificant
Time / Schedule	Significant change to standard leasing contract (currently under review by Westfield)	H - Likely 60-79%	L - Minor	M	\$50,000.00	L - Minor

In the example the Risk Matrix has been selected for display. This matrix is the same for both the Risk Summary and Risk Detailed template objects.

Document Output View

The output is the resulting table based on the filters and sort sequences selected in the document preparation phase.

Risk Summary

Category	Risk	Current				Treated			
		L	C	Level	Exposure	L	C	Level	Contingency
Cost	Inaccurate Stage 1 - 25% budget	M - Possible 40-59%	H - Significant	M(	\$0.00	VL - Rare <=20%	M - Moderate	L(	\$0.00
Scope	Inadequate project scoping and scope creep	M - Possible 40-59%	L - Minor	L(	\$10,000.00	L - Unlikely 20-39%	L - Minor	L(	\$1,000.00
Cost	Industrial policy changes due to EU exit	L - Unlikely 20-39%	L - Minor	L(	\$0.00	M - Possible 40-59%	L - Minor	L(	\$0.00
Time / Schedule	Late changes to design by client	L - Unlikely 20-39%	L - Minor	L(	\$0.00	VL - Rare <=20%	VL - Insignificant	VL(	\$0.00
Cost	Materials prices increases due to tight supply	VH - Almost Certain	VH - Major	VH(	\$300,000.00	VL - Rare <=20%	M - Moderate	L(	\$50,000.00
Quality	Materials used may not match design	H - Likely 60-79%	H - Significant	H(	\$0.00	L - Unlikely 20-39%	M - Moderate	L(	\$0.00
Quality	poor supplier integration / management	VL - Rare <=20%	M - Moderate	L(	\$12,500.00	VL - Rare <=20%	VL - Insignificant	VL(	\$1,890.00
Resource	Resource constraints	L - Unlikely 20-39%	L - Minor	L(	\$0.00	L - Unlikely 20-39%	L - Minor	L(	\$0.00
Time / Schedule	Significant change to standard leasing contract (currently under review by Westfield)	H - Likely 60-79%	L - Minor	M(	\$50,000.00	L - Unlikely 20-39%	L - Minor	L(	\$5,000.00
Cost	Slow delivery puts pressure on 2019 Budget	L - Unlikely 20-39%	M - Moderate	L(	\$0.00	VL - Rare <=20%	L - Minor	VL(	\$0.00

Team Selector

The Team Selector option allows for selection of multiple Team Members from the Internal Resource Pool and assigning them to a specific role for the project.

Source of Data

The Internal Resource Pool for the UniPhi system. Generally this is all the internal organisation team members.

Template View

Input Object Type



Team Selector ▼ Hide Output

Document Edit View

When editing the document simply place a tick against the team members to be added to the document

Team Selector

- Select All/None**
- Annie Lennox
- Arthur Williams (Birdcat Construction)
- Blake Lewis (Stowe)
- Clint Martin
- Cyndi Lauper (Birdcat Construction - Archived)
- Denis Adams
- Denise Meehan (Wesfarmers)
- Joey Lydon
- Joseph Hunter
- Someone (ABC Architects Pty Ltd)
- Tammy Member
- Tim Mander

Document Output View

In this example three team members have been selected.

Team Selector

- Annie Lennox
- Arthur Williams (Birdcat Construction)
- Clint Martin
- Denise Meehan (Wesfarmers)
- Someone (ABC Architects Pty Ltd)

Team Selector (Single)

The Team Selector (Single) option allows for selection of a single Team Member from the Resource Pool.

Source of Data

The Resource Pool for the UniPhi system.

Template View

The template object selector only provides one option to select the role that will be assigned to the selected resources during document creation.

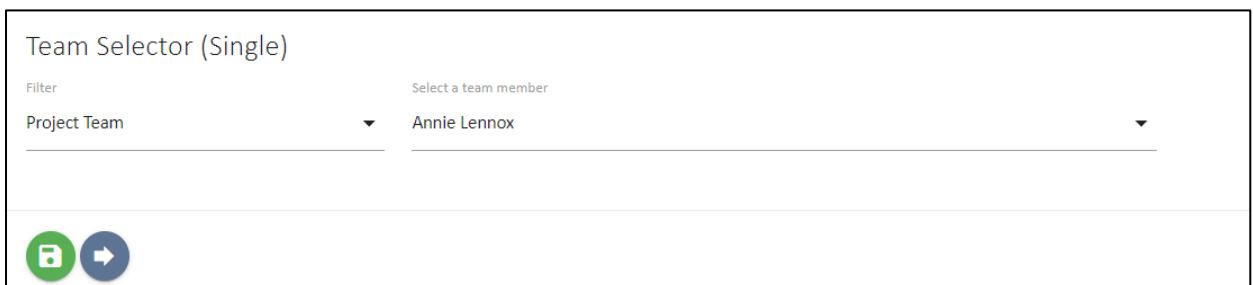


Input Object Type Hide Output

Team Selector (Single) ▼

Document Edit View



When creating a document the selection of a team member will include them in that role.



Team Selector (Single)

Filter Select a team member

Project Team ▼ Annie Lennox ▼

Document Output View

In this example the selected resource will appear in the output document.



Team Selector (Single)

Annie Lennox

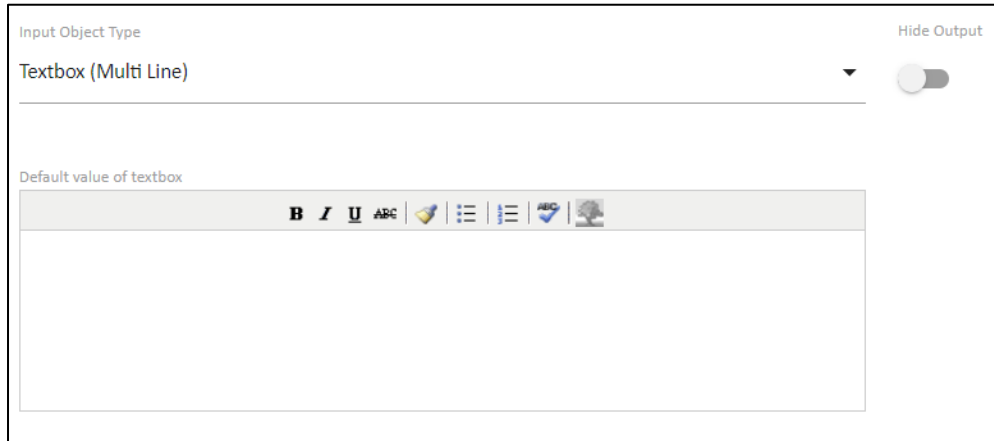
Textbox (Multi Line)

This field is a larger text box providing for descriptive information to be recorded. Similar to the Textbox (Single Line) except that it provides a larger field size.

Source of Data

The data source for this is the author during document creation.

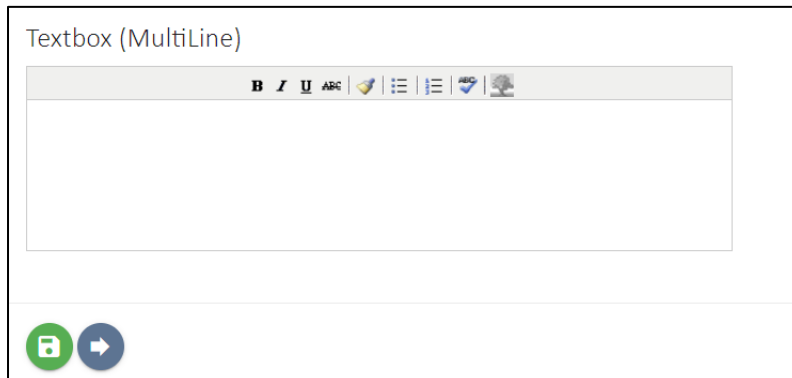
Template View



There are no options for this object other than providing for some default text to be displayed.

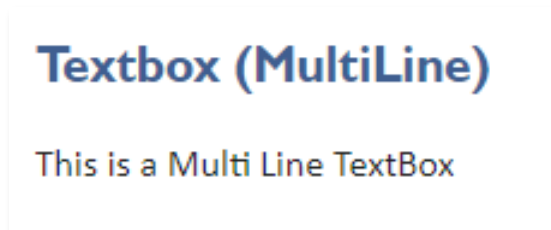
Document Edit View

There is a minimal set of controls for the text formatting in this object.



Document Output View

The entered text is displayed in multiple lines as formatted.



Textbox (Single Line)

This is a field that is a single line of text that can include numbers. It is useful where there is a piece of information such as a short description or a value collected from an ad hoc source to be inserted into the document.

Source of Data

The data source for this object is the author during document creation.

Template View



The screenshot shows the configuration interface for a 'Textbox (Single Line)' object. At the top left, the label 'Input Object Type' is followed by a dropdown menu currently set to 'Textbox (Single Line)'. To the right of this dropdown is a 'Hide Output' toggle switch, which is currently turned off. Below these controls is a large, empty text input field. At the bottom of the interface, there is a label 'Default value of textbox' followed by another empty text input field.

There are no options for this object other than providing for some default text to be displayed.

Document Edit View

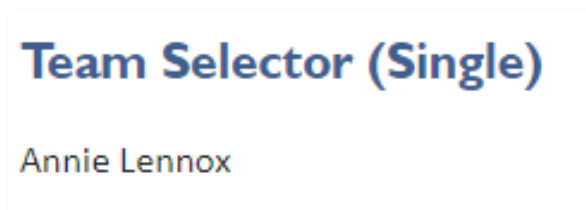
Enter a single line of text or as a simple data entry field for a name or numeric data.



The screenshot shows the 'Document Edit View' for a 'Textbox (Single Line)' object. The title 'Textbox (Single Line)' is at the top. Below it is a 'Step Title' label followed by a text input field containing 'Textbox (Single Line)'. Further down, there are two dropdown menus: 'Page Orientation' set to 'Portrait' and 'Page Break' set to 'None'. To the right of these is a 'Hide Output' checkbox, which is currently unchecked. At the bottom of the view, there are two circular icons: a green one with a document symbol and a blue one with a right-pointing arrow.

Document Output View

The entered text is displayed as a single line.



The screenshot shows the 'Document Output View' for a 'Textbox (Single Line)' object. It displays the text 'Team Selector (Single)' in a large, bold, blue font. Below this, the text 'Annie Lennox' is displayed in a smaller, standard blue font.

Textbox (Rich)

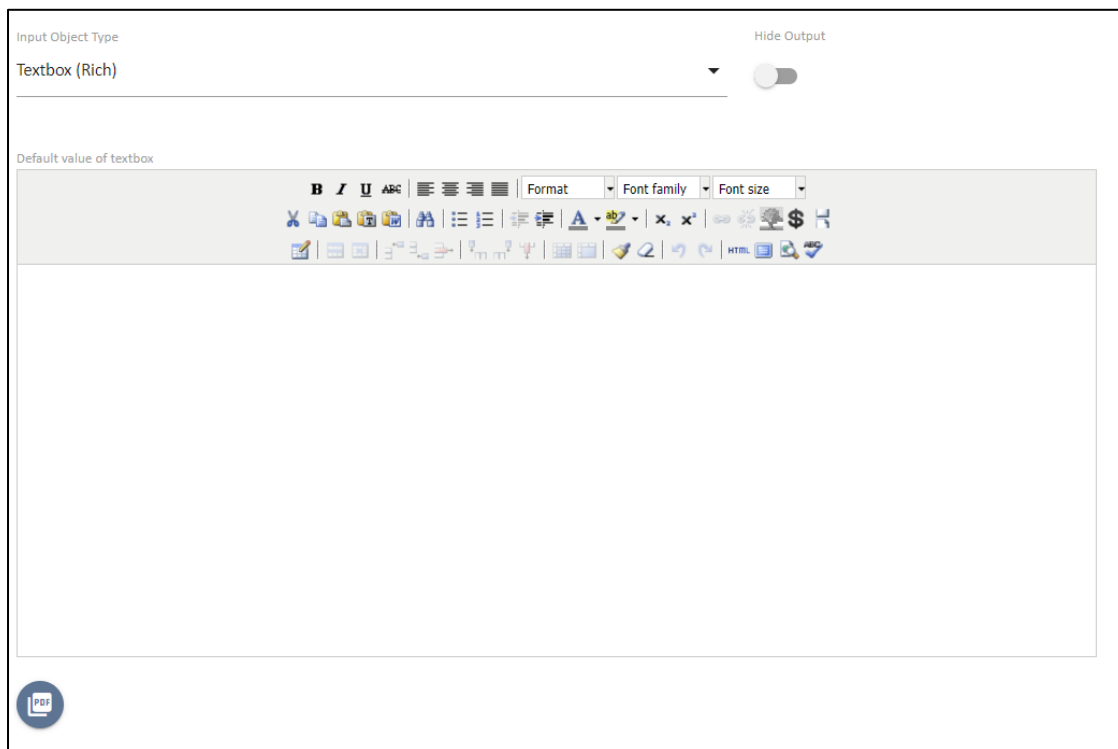
The Rich Text Editor is the main control used in UniPhi documents. The details of this are covered in the Document Management Manual but the use of this object in the template provides additional features that are not available during document preparation.


Source of Data

The initial source of the data is any text entered during the template preparation and the values of any Template Variables embedded in that text. Supplemental data source is the author during document preparation.

Template View

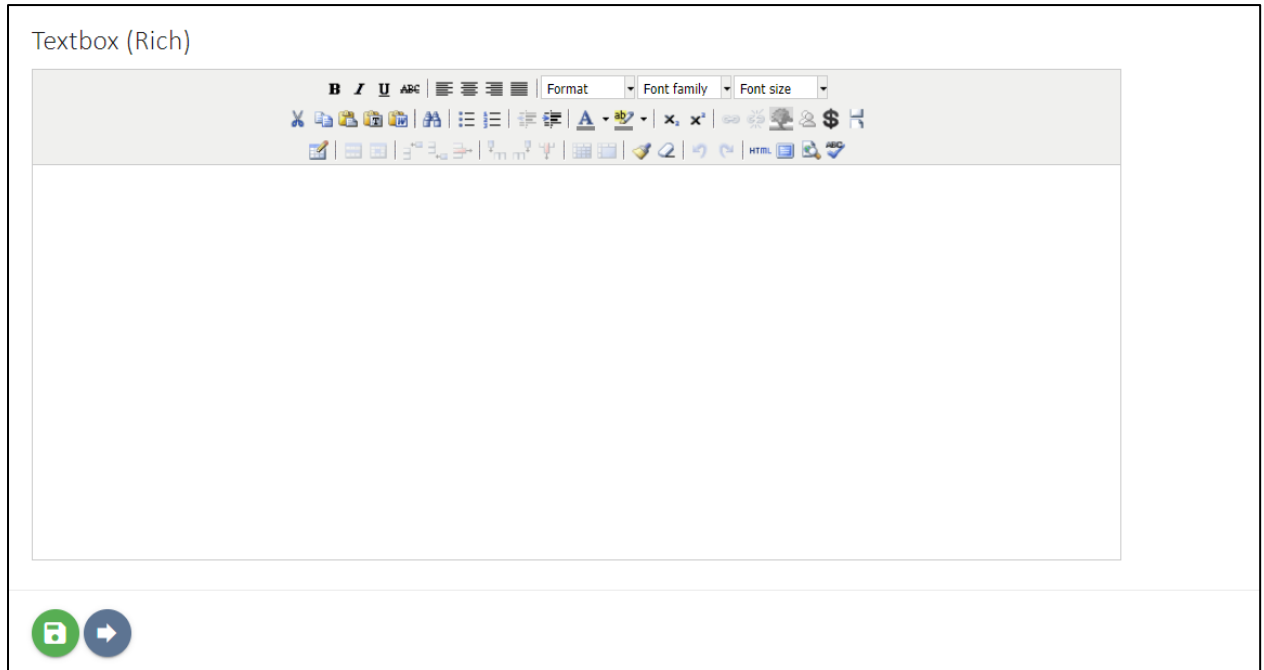
There are no specific options for the Rich Text box object but the controls in the toolbars in the template view are slightly different from the document edit view.



 The variable icon provides for adding template variables to the document in the Rich Text box. The available variables will depend on the other objects in the template. For example Contract related variables will only be available if a Contract selector object is also present as that object would determine the relevant contract to be used with the variables.

Document Edit View

The document edit view provides for all the standard controls.



The template variables added in the template default text are converted to the values found in the UniPhi database for the project context. The invalid template variable `$project.naem` (should have been spelt as `$project.name`) appears as black text indicating that it is being treated as plain text due to not be recognised.

The red text for the `$Resource.Email` indicates that the variable is valid but that the database does not have a value for the requested variable. A complete list of text box formatting controls is included in the Document Management Manual.

A complete list of template variables is included as an appendix to this manual.

The output of the document will display as text formatted by the organisation style sheet information.

Textbox (Rich)

The contents of this textbox can be any standard text.

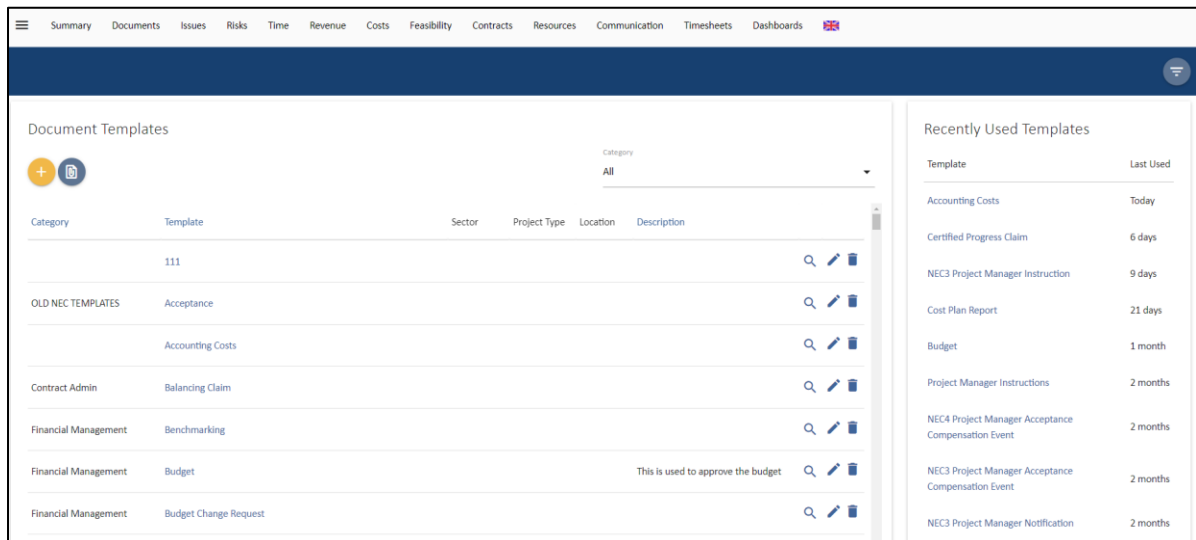
It can also include variable values from the database. This allows for preparing standard text that will be populated in the context of the project.

An invalid template variable (ie. if mis-spelt incorrectly), such as \$project.naem will appear in black text as the system does not recognise it as a variable.

However, a template variable that is correct but has no data returning will be displayed by being highlighted in red as such, **alennox@optimum.com**

Template Variables

The Template Variables are configured in the Configuration > Template Variables section of UniPhi.



The Scope option to the right provides for filtering on relevant context for the variables like Resources, or Contracts.

A variable can be added if the administrator has sufficient understanding of SQL and the UniPhi or related databases. Note that if any database on the same server can provide input for template variables. This should be discussed with UniPhi support for the specific installation before doing so.