

# Unity Construct User Training

PWA Review Process (PWARP)

Informational How-To Guide

**Trimble Unity Construct**

My Home Dashboard Projects Forms Processes Documents Contacts Bidding Cost Schedule Reports Time Tracking Se

Welcome,

My Processes

Project	Instance	Subject	Step
Master Project	MCAP - 1	Testing	Director Review
Master Project	MCAP - 2	Testing!	Director Review (G
Master Project	MCAP - 3	Testing 3!	DBB Data Collectio
Master Project	MCAP - 4	Test 4	GCA Data Collectio
Master Project	MCAP - 5	Test - GCA	GCA Data Collectio
Master Project	MCAP - 6	Testing!	Director Review (D
Master Project	MCAP - 7	Testing!	Director Review (D
Master Project	MCAP - 8	Testing the Project Manager	Director Review (S
Master Project	MCAP - 9	Test - SCA	SCA Data Collectio
Master Project	MCAP - 10	Test - DBB	DBB Data Collectio

View: 10 25 50

My Forms

Project	Number	Subject
UMSystem Unity Construct Support	Unity Construct - Enhancement/Issue Form #14	Construction Labor Blanket Contract
UMSystem Unity Construct Support	Unity Construct - Enhancement/Issue Form #29	Master Commitment Process - need dynamic labor rates
UMSystem Unity Construct Support	Unity Construct - Enhancement/Issue Form #56	1.50, 1.51 and 1.54 Code and Permit Process - with inspection log file MM not populating all d

**Announcements**

**DocuSign Prep Instructions**  
Instructions

**User Guides for Consultants and Contractors**  
Quick references for using e-Builder  
<https://www.umssystem.edu/ums/fa/facilities/e-builder-information-contractors-architects-and-engineers>

**User Guides for Internal Staff**  
Quick references for using e-Builder  
<https://www.umssystem.edu/ums/fa/facilities/e-builder-information-campus-staff>

**New Unity Construct Support Email Contact**  
Please email eBuilder support issues and questions to: [ebuilderrequests@umssystem.edu](mailto:ebuilderrequests@umssystem.edu)

Form Link

**Unity Construct Enhancements**  
Latest documentation on internal configuration changes and enhancements to eBuilder:  
<https://collaborate.umssystem.edu/sites/fpd/publ>



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# Role and Responsibility Matrix

The table below outlines the process steps within the workflow and which role is responsible for that specific step.

Section	Process Step	Role	Action
Setup	Start	0 - eB Admin	Submit
		1 - Compliance Reviewer 1 - Contract Administrator	
Review Steps	Contractor - Geothermal Compliance	2 - Contractor Geothermal Compliance	Submit
	CPM Review	1 - Construction Project Manager (CPM)	Reviewed or Revise to GC
	Contractor Revise	2 - Contractor Geothermal Compliance	Resubmit
	Tracking Agent Review	1 - Tracking Agent	Reviewed
	Final Review	1 - Compliance Reviewer	Approve or Revise to GC



*Note: If you take a Revise action, the process will either go back into the Contractor's court.*

*\*See [page 18](#) for the full [workflow view](#)*

# Approving a Process

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PWA Review Process (PWARP)

# Approving a Process

## PWA Review Process (PWARP)

1

From the My Home tab, find the appropriate instance in the My Processes section. Having a process in this section indicates that the item is in your court to review and approve before it can move forward in the workflow.

You can open the process by clicking on the process item's numbers. When clicked, the instance will open.

The screenshot shows the Trimble Unity Construct web interface. The top navigation bar includes the logo and the text 'Trimble Unity Construct', along with search and user profile icons. Below the navigation bar is a menu with tabs: 'My Home' (selected), 'Dashboard', 'Projects', 'Forms', 'Processes', 'Documents', 'Contacts', 'Bidding', 'Cost', 'Schedule', 'Reports', and a dropdown menu. The main content area features a 'Welcome' message, a 'My Processes' section with a table, and a 'My Home' button. The table has columns for Project, Instance, Subject, Step, Date Due, and Requested Comment. The first row is highlighted, and a yellow circle with the number '1' and an arrow points to the 'PWARP - 6' instance.

Project	Instance	Subject	Step	Date Due	Requested Comment
*Avicado Construction Technology Services	PWARP - 6	PWA - Week of 12/11/2024   Matthew Tome's Sub Company	Contractor Revise		
*Avicado Construction Technology Services	PWARP - 7	PWA - Week of 12/12/2024	Contractor - Geothermal Compliance		

# Processes – Approving a Process

## PWA Review Process (PWARP)

Fill out the data fields as necessary.

2 Read any instructions located in the blue banner, as they are there to assist with any questions you may have.

The data fields with the red asterisk (\*) are required and needed to be filled out in order for the process to move forward.

The screenshot displays the 'Initiator Submission' form with the following fields and instructions:

- Number of Subcontractors Requiring PWA:** A text input field.
- \* Certified Payroll (PDF):** A file upload field with a 'Drag and drop file here' placeholder and 'Browse Computer' and 'Browse e-Builder' buttons.
- \* Labor Hour Tracking Sheet (Excel):** A file upload field with a 'Drag and drop file here' placeholder and 'Browse Computer' and 'Browse e-Builder' buttons.
- \* Is this the subcontractors first time working on this project?:** Radio buttons for 'Yes' and 'No'. Below this, a note states: 'If this field is marked **YES**, please upload the **Apprenticeship Program Certification** file in the designated field below.'
- Apprenticeship Program Certification (PDF):** A file upload field with a 'Drag and drop file here' placeholder and 'Browse Computer' and 'Browse e-Builder' buttons.
- \* Request good faith exception?:** Radio buttons for 'Yes' and 'No'.
- Apprenticeship Evidence:** A file upload field with a 'Drag and drop file here' placeholder and 'Browse Computer' and 'Browse e-Builder' buttons.
- \* GC/CM Comments:** A rich text editor with a toolbar (font face: 'Segoe UI', size: 12px, bold, italic, underline, text color: 'abe', and various alignment and list options).
- \* Acknowledgement:** A checkbox with the text 'I acknowledge that the information submitted in this process complies with IRA requirements.'

# Processes – Approving a Process

## PWA Review Process (PWARP)

At the bottom of the page, there is a section titled ***Additional PWAs***.

- 3 Each additional subcontractor on the project needs a PWA assigned to them. To do this, use the **Start Additional PWA** button.

**Additional PWAs** ^

If you have more than one subcontractor on this project, please click the button below to submit additional PWAs as needed.

Additional PWAs:  **Start Additional PWA**

3

Submit ▼ Take Action Check Spelling Print Copy Delegate Save Cancel

# Processes – Approving a Process

## PWA Review Process (PWARP)

For every subcontractor on the project, they need a PWA.

The table gives a visual explanation:

Total Number of Subcontractors	Original PWA	Additional PWAs
2	1	1
5	1	4
4	1	4



Note: the first PWA that has been initiated counts as one PWA.



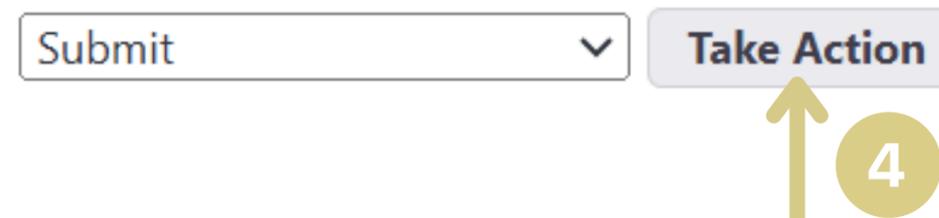
# Processes – Approving a Process

## PWA Review Process (PWARP)

Once the information has been entered, you can take your action.

- 4 From the **Please select an action** drop down button, select your action. Then click the **Take Action** button.

This will move the process to the next step.



The image shows a user interface element consisting of a dropdown menu on the left with the text 'Submit' and a downward-pointing chevron icon. To the right of the dropdown is a rectangular button with rounded corners and the text 'Take Action'. A yellow arrow points upwards from a yellow circle containing the number '4' towards the 'Take Action' button.

# Other Things to Note

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PWA Review Process (PWARP)



# Other Things to Note - Taking a Revise Action

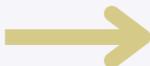
## PWA Review Process (PWARP)

On the **CPM Review** and **Final Review** steps, when revising the process instance, you **MUST** choose why you are revising the process.

Under the CPM Review (on the CPM Review step) and the Final Review (on the Final Review step) sections, you must check the reasons for revision.

The **Revision Reason** data field lists a few documents that need to be selected if revising.

**CPM Review** 

<p>* Subcontractor Company Name:</p> <p> Revision Reason:</p>	<input type="text"/> <input type="checkbox"/> Certified Payroll <input type="checkbox"/> Certified Payroll - Restitution and Interest Payments <input type="checkbox"/> Labor Hour Tracking Sheet <input type="checkbox"/> Apprenticeship Program Certification
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# Tracking a Process

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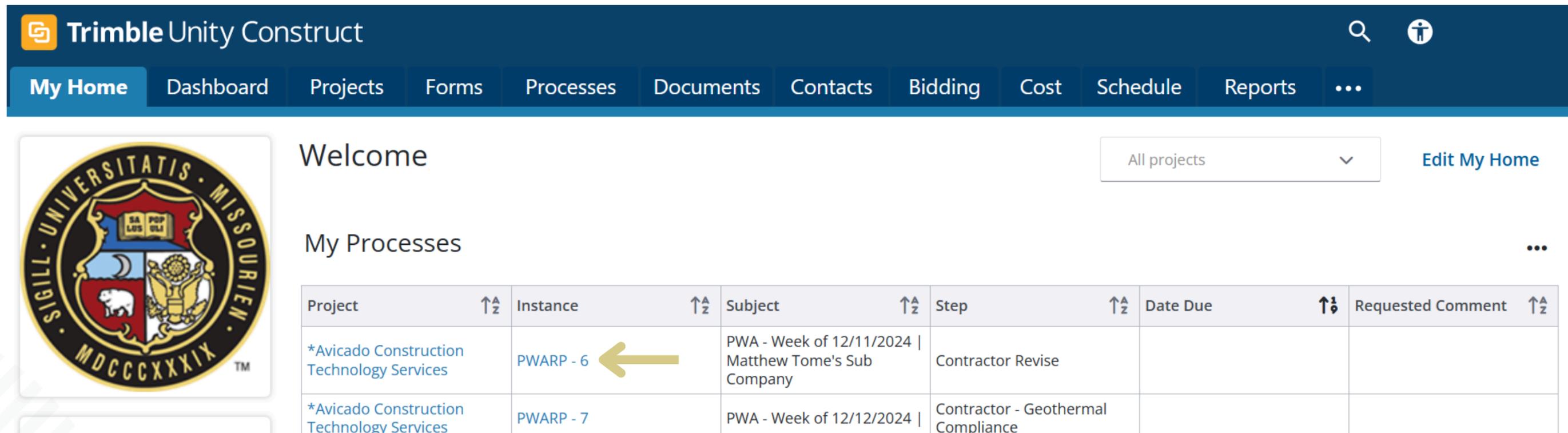
PWA Review Process (PWARP)

# Processes in Your Court

## PWA Review Process (PWARP)

When a process lands in your court, you will see it under the **My Processes** section. Having items in the My Processes section indicates that the item is in your court to review and approve before it can move forward in the workflow.

You can open the process by clicking on the process item's numbers. When clicked, the instance will open.



The screenshot shows the Trimble Unity Construct web application interface. The top navigation bar includes the logo and name 'Trimble Unity Construct', a search icon, and a user profile icon. Below the navigation bar is a menu with options: My Home, Dashboard, Projects, Forms, Processes, Documents, Contacts, Bidding, Cost, Schedule, Reports, and a dropdown menu. The main content area features a 'Welcome' message, a dropdown menu for 'All projects', and an 'Edit My Home' link. The 'My Processes' section is highlighted, showing a table of process instances. A yellow arrow points to the 'PWARP - 6' instance in the table.

Project	Instance	Subject	Step	Date Due	Requested Comment
*Avicado Construction Technology Services	PWARP - 6	PWA - Week of 12/11/2024   Matthew Tome's Sub Company	Contractor Revise		
*Avicado Construction Technology Services	PWARP - 7	PWA - Week of 12/12/2024	Contractor - Geothermal Compliance		

# Processes in Your Court

## PWA Review Process (PWARP)

When you open the process, you will see a section that says "Current Workflow Step." Next to that, you will see the current step that the instance is in.

In the example on the right, the instance is shown in the "Contractor Revise" step.

PWA Review Process (PWARP) - 6 Workflow Override All Fields View

Accept Decline Resubmit Take Action Check Spelling Print Copy Delegate Save Cancel

Project:	*Avicado Construction Technology Services	Project Number:	*AVICADO
Process Document:	PWARP - 6	Overall Due Date:	
Current Workflow Step:	Contractor Revise <a href="#">Show History</a>   <a href="#">Current Actors</a>	Step Due Date:	
Subject:	PWA - Week of 12/11/2024   Matthew Tome's Sub Company		
Status:	Submitted		

*Tip: If you were to click on the "Show Workflow Diagram" link, it will open a visual of the current workflow steps.*



# Processes in Your Court

## PWA Review Process (PWARP)

See below for more information about key features to know:

### Project

The name of the Project. This example is for the Demo account.

### Show History

A link to show the history. When clicked, a new page will appear.

### Process Document

The document and process counter. Each process is assigned a unique number when submitted.

### Current Actors

This shows the person who has the process in their court. This person is currently responsible for reviewing/approving the item.

## PWA Review Process (PWARP) - 6

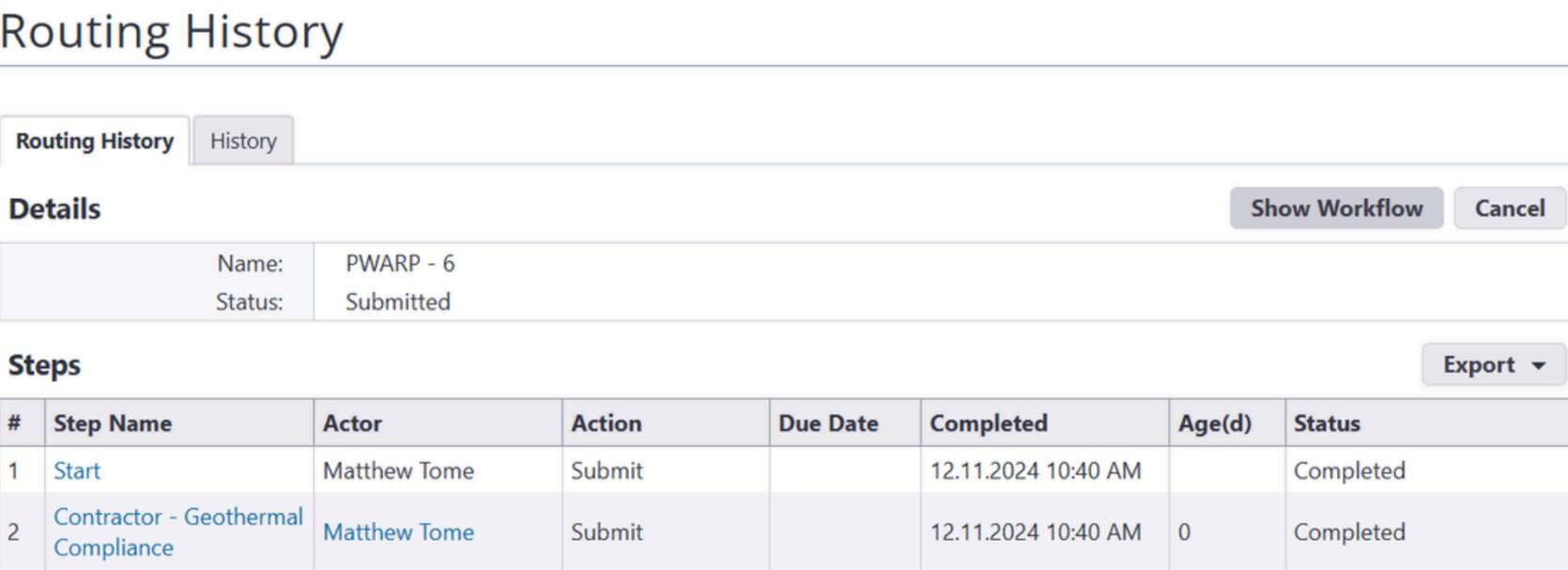
<a href="#">Accept</a>	<a href="#">Decline</a>	<input type="text" value="Resubmit"/>	<a href="#">Take Action</a>
Project:	*Avicardo Construction Technology Services		
Process Document:	PWARP - 6		
Current Workflow Step:	<a href="#">Show History</a>   <a href="#">Current Actors</a>		
Subject:	Contractor Revise <a href="#">Show Workflow Diagram</a>		
Status:	PWA - Week of 12/11/2024   Matthew Tome's Sub Company		
	Submitted		

# Processes in Your Court - Show History

## PWA Review Process (PWARP)

If you click the **Show History** hyperlink, a new window will pop-up in the Routing History tab. This tab is going to show you every step in the workflow, if someone acted on the process (anytime someone reviewed it or approved it) and what happened.

In the photo, you can see every step in the workflow that this process has gone through, who the actor was on each of those steps, the action that was taken at each of those steps, the date that it was completed, and how many days it was in that step before it was acted on. You can also view the status of each step as it progresses from one step to the next.



**Routing History**

Routing History History

**Details** Show Workflow Cancel

Name: PWARP - 6  
Status: Submitted

**Steps** Export

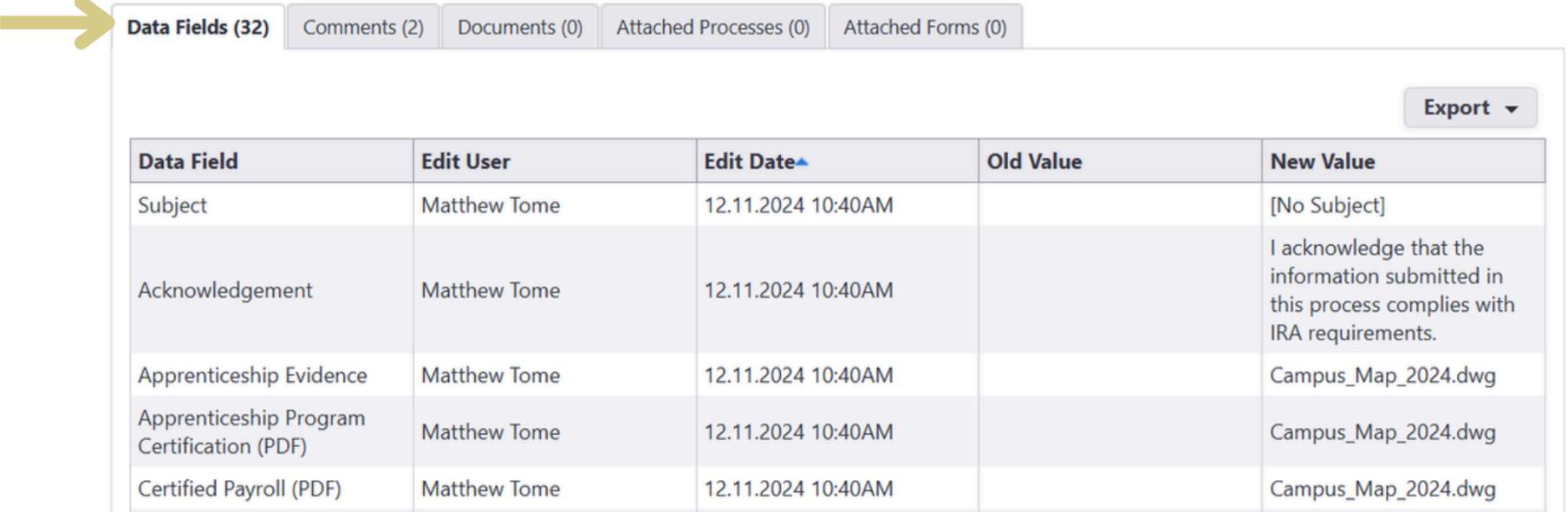
#	Step Name	Actor	Action	Due Date	Completed	Age(d)	Status
1	Start	Matthew Tome	Submit		12.11.2024 10:40 AM		Completed
2	Contractor - Geothermal Compliance	Matthew Tome	Submit		12.11.2024 10:40 AM	0	Completed

# Processes in Your Court - Show History

## PWA Review Process (PWARP)

If you scroll down on the same screen, you can see all the different data fields. These are the data fields that were completed when the process was started. The data fields are on the first column, then you will see who edited the information within that data field, the date that it was edited, and, on the right side of the screen, you can see the values that were entered.

If any changes are made to these data fields, as it moves through the workflow, you will be able to see what the old information was, what the person updated it to, and what the new information is.



The screenshot shows a software interface with a 'Data Fields (32)' tab selected. The table below displays the edit history for various data fields.

Data Field	Edit User	Edit Date	Old Value	New Value
Subject	Matthew Tome	12.11.2024 10:40AM		[No Subject]
Acknowledgement	Matthew Tome	12.11.2024 10:40AM		I acknowledge that the information submitted in this process complies with IRA requirements.
Apprenticeship Evidence	Matthew Tome	12.11.2024 10:40AM		Campus_Map_2024.dwg
Apprenticeship Program Certification (PDF)	Matthew Tome	12.11.2024 10:40AM		Campus_Map_2024.dwg
Certified Payroll (PDF)	Matthew Tome	12.11.2024 10:40AM		Campus_Map_2024.dwg

# Processes in Your Court - Show History

## PWA Review Process (PWARP)

At the top of the page, if you click on the **History** tab, you can see if/when someone looked at that specific process.

### Process History

Routing History **History** ←

#### Details

Show Workflow

Cancel

Name: PWARP - 6  
Status: Submitted

#### History

Print



Name	Company	Time Stamp	Step Name	Access	Description
Braunworth, Taylor	Avicado	12.16.2024 5:21 PM	10 - Contractor Revise	View	
Tome, Matthew	Avicado Construction Technology Services	12.11.2024 3:58 PM	8 - Final Review	View	
Tome, Matthew	Avicado Construction Technology Services	12.11.2024 10:48 AM	8 - Final Review	View	

# Processes in Your Court - Current Workflow

## PWA Review Process (PWARP)

### PWA Review Process (PWARP) - 6

[Workflow Override](#) [All Fields View](#)

[Accept](#) [Decline](#)  [Take Action](#) [Check Spelling](#) [Print](#) [Copy](#) [Delegate](#) [Save](#) [Cancel](#)

Project:	*Avicado Construction Technology Services	Project Number:	*AVICADO
Process Document:	PWARP - 6	Overall Due Date:	
Current Workflow Step:	Contractor Revise <a href="#">Show Workflow Diagram</a>	Step Due Date:	
Subject:	PWA - Week of 12/11/2024   Matthew Tome's Sub Company		
Status:	Submitted		

To view the process workflow, click on the **Show Workflow Diagram** hyperlink (shown in the image) from the specific process page.

This will prompt a pop-up screen with the entire workflow (shown on the next page).

# Processes in Your Court - Current Workflow

## PWA Review Process (PWARP)

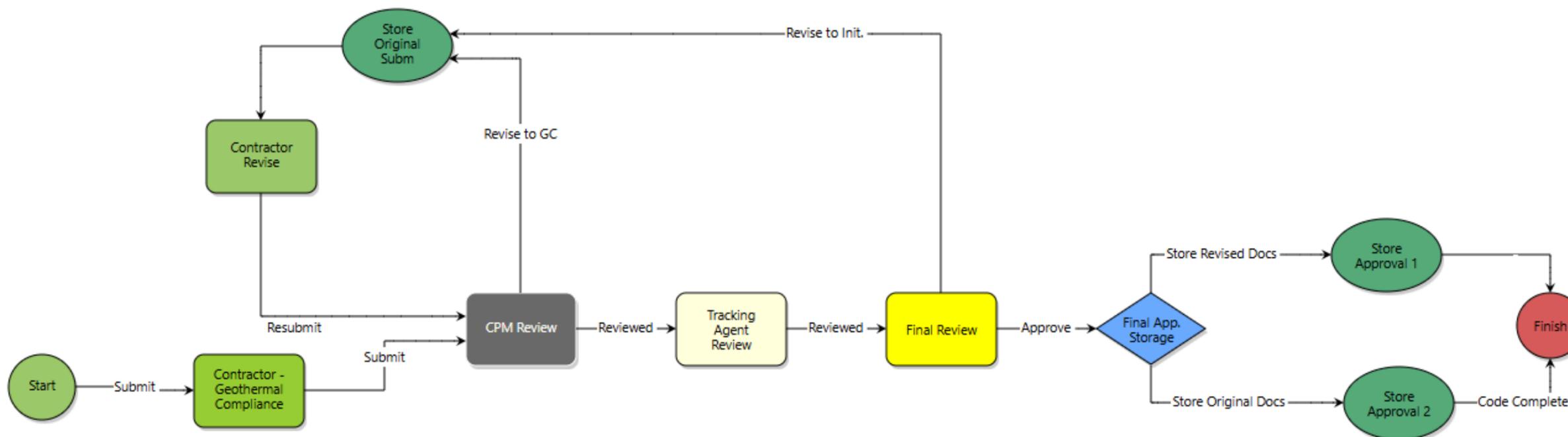
For a PWARP, the entire workflow can be found below:

### Key

 The green oval steps are Mail Merges and are a "Code" step. A Code step is all the information that has been entered in Unity Construct, which gets put into a PDF template for the next person to review.

 Each of the rectangles represent a different step in the flow, essentially, a different actor. You can tell what step it is in currently by the **darker blue ring** around it.

 The blue diamonds represent conditional steps. Conditional steps are defined statements that can take a path of true or false. If a certain criteria is met then route the process one way, otherwise if not, route it another direction.



# Starting a Process

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PWA Review Process (PWARP)

# Processes – Starting a New Process

PWA Review Process (PWARP)

- 1 Once you have searched for and located your project, you can start a new process by clicking the **Start Process** button in the upper right-hand corner of the page.

My Home | Dashboard | Projects | Forms | **Processes** | Documents | Contacts | Bidding | ...

Unfinished Drafts | Import Processes

Project Processes

Filter by...

**Start process**

Filters

# Processes – Starting a New Process

## PWA Review Process (PWARP)

2 Click on the hyperlink for the process you want to start.

Once selected, click on the **Start PWARP** button on the bottom right. After that, you will be directed to a page for the Start step of the workflow.

3

A search results dropdown menu is shown. The search bar at the top contains the text 'PWA Review Process (PWARP)'. Below the search bar, several process entries are listed. The entry 'PWA Review Process (PWARP)' is highlighted in blue and has a checkmark to its left. A yellow arrow with the number '2' points to this entry. Other entries include '70.00 - Invoice Approval (INV)', '80.00 - Admin - Cost Process Exceptions Import (CEI)', '999 - Commitment Approval CA (CA)', and 'x Admin Location Update (APU)'. A scroll bar is visible on the right side of the dropdown.

2

Download PWARP

Start PWARP

3

Note: For this guide, the PWA Review Process (PWARP) example will be shown on the following pages.



# Processes – Starting a New Process

## PWA Review Process (PWARP)

4 If this is an additional PWA that needs to be initiated, click the **Submit** button to continue.

PWA Review Process (PWARP)

Start Process Print Check Spelling Submit Save Draft Cancel

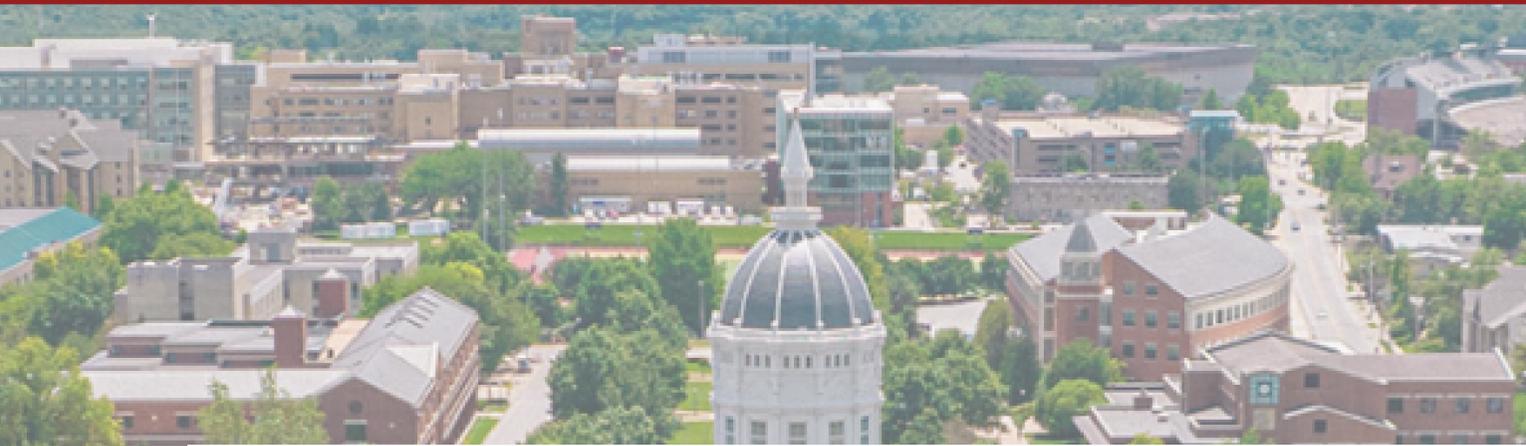
Project:	*Avicado Construction Technology Services
Project Number:	*AVICADO
Process:	PWA Review Process

Details Documents (0) Attached Processes (0) Attached Forms (0) PWA Review Proc (0)

Expand All | Collapse All

**NOTE**

**THIS IS AN AUTOMATED PROCESS THAT IS SUBMITTED TO THE GC'S COURT EVERY OTHER WEEK. IF YOU WISH TO KICK OFF THIS PWA PROCESS AD-HOC, CLICK SUBMIT.**



# Contact

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For additional assistance, please contact a member of the Unity Construct Admin team.

