

# Unifier - Creating a Pencil Estimate

1 Enter/select your project

The screenshot displays the Oracle Primavera Unifier interface. At the top, the project name "T201611601-SR2 Red Mill Rd Intersection Improvement" is highlighted with an orange circle. The interface is divided into several sections:

- Tasks:** Shows 43 Active tasks. A pie chart titled "My Active Tasks" displays the distribution: 42 Not Started (yellow), 1 In Progress (green), and 1 Late (red).
- Task Distribution:** A horizontal bar chart shows the count for various task categories:

Task Category	Count
Pavement and Rehabil...	8
SR2 Red Mill Rd Inters...	2
SUBDIVISION PAVING, ...	1
SUBDIVISION PAVING, ...	1
Bridge 3-402 on US11...	1
Resilience Paving & Re...	1
Pile Jacketing Sussex...	1
- Notifications:** Shows a total of 1,756 notifications.
- Workflow Business Processes:** A section for workflow business processes, currently empty.
- Non - Workflow Business Processes:** A section for non-workflow business processes, currently empty.

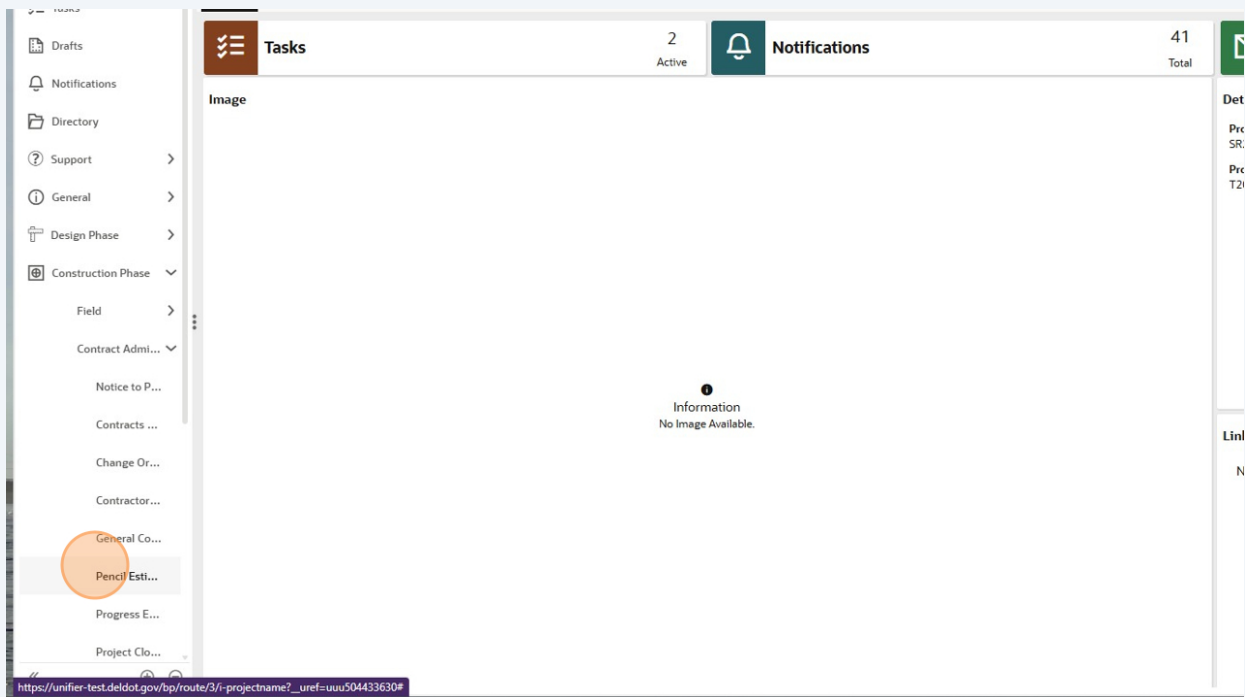
## 2 Click "Construction Phase"

The screenshot shows the Oracle Primavera Unifier (TEST) interface. The breadcrumb navigation is 'DeIDOT > DOTS > T201611601'. The left sidebar contains a navigation menu with items: Tasks, Drafts, Notifications, Directory, Support, General, Design Phase, Construction Phase (highlighted with an orange circle), Document Manager, Reports, and Admin. The main content area displays a 'Summary' view for 'Workspaces'. At the top, there are two summary cards: 'Tasks' with 2 Active items and 'Notifications' with 41 Total items. Below these is an 'Image' placeholder with the text 'Information No Image Available.' On the right side, there is a 'Details' section showing 'Proje SR2 F' and 'Proje T201', and a 'Links' section with 'No'.

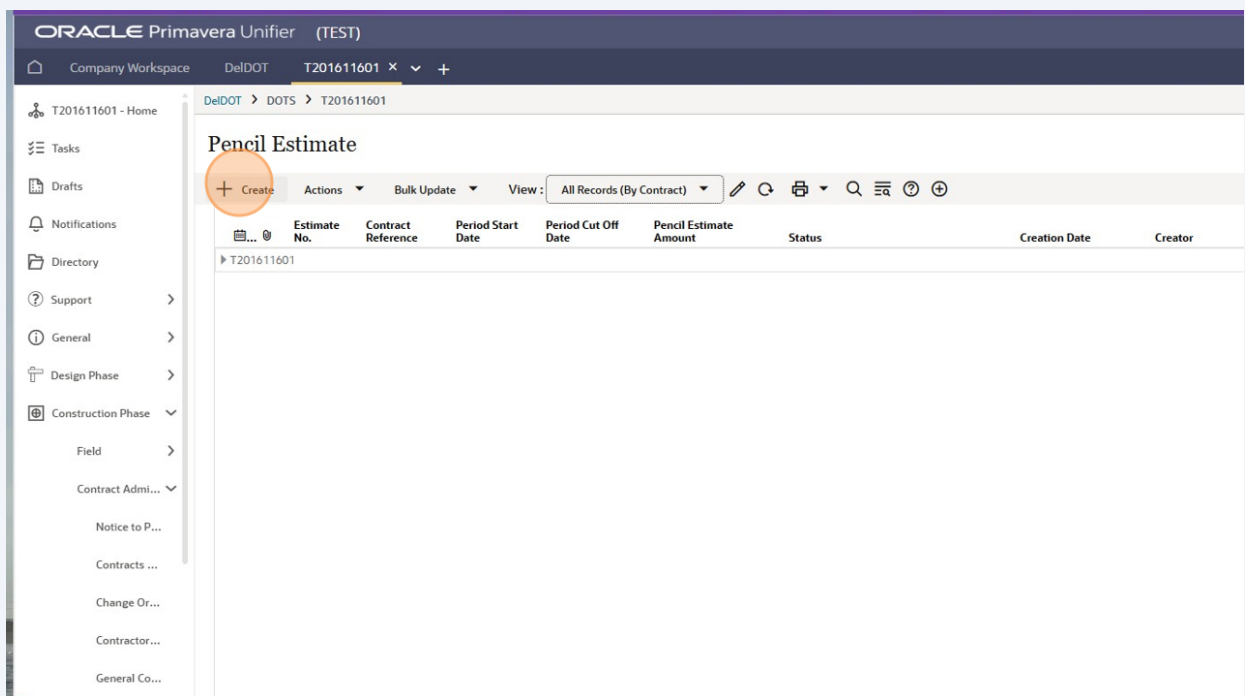
## 3 Click "Contract Administration"

The screenshot shows the Oracle Primavera Unifier (TEST) interface. The breadcrumb navigation is 'DeIDOT > DOTS > T201611601'. The left sidebar contains a navigation menu with items: Tasks, Drafts, Notifications, Directory, Support, General, Design Phase, Construction Phase (expanded), Field, Contract Administration (highlighted with an orange circle), Construction Ge..., Document Manager, Reports, and Admin. The main content area displays a 'Summary' view for 'Workspaces'. At the top, there are two summary cards: 'Tasks' with 2 Active items and 'Notifications' with 41 Total items. Below these is an 'Image' placeholder with the text 'Information No Image Available.' On the right side, there is a 'Details' section showing 'Prc SR:' and 'Prc T2:', and a 'Links' section with 'N'.

#### 4 Click "Pencil Estimate"



#### 5 Click "Create"



## 6 Use this icon to select Contract Reference


Create New Pencil Estimate - Project No. T201611601 - Google Chrome  
unifier-test.deldot.gov/bp/mod/bp/record/new/uxppa/1303/31371?\_uref=uuu504433630t3

### Create New Pencil Estimate

Save Draft More Actions

Pencil Estimate

**General**

Contract Reference \*   Required


Project Name

Estimate No.

Project Number


Period Start Date


Record No.

Period Cut Off Date \*  Required 

Creation Date


Time Used This Period


Creator  Alicia Howard

Pencil Estimate Dollar Amount  

Status

Attachments Comments Linked Records






 Information  
No Attachments.

## 7 Select the Contract Reference

Create New Pencil Estimate - Project No. T201611601 - Google Chrome  
unifier-test.deldot.gov/bp/mod/bp/record/new/uxppa/1303/31371?\_uref=uuu504433630t3

### Contracts - Summary

Record Number	Contract No	Title	Contract Type	Contract Description	Status	Vendor Name	
4 Mumford & Miller Concrete Inc	CON-002	T201611601	SR2 Red Mill Rd Intersection Improvement	Construction	Approved	Mumford & Miller Conc...	
4 None	CON-001	T201611601AU	Advanced Utility Work	Advanced Utilities	This contract is to be u...	Approved	

Total: 2

Cancel Sele

## 8 Enter the Period Cut Off Date

Create New Pencil Estimate - Project No. T201611601 - Google Chrome  
unifier-test.deldot.gov/bp/mod/bp/record/new/uxppa/1303/31371?\_uref=uuu504433630t3

### Create New Pencil Estimate

Save Draft More Actions

Pencil Estimate

**General**

Contract Reference \*  
T201611601

Estimate No.  
[Empty]

Period Start Date  
[Empty]

Period Cut Off Date \*  
MM/DD/YYYY

Time Used This Period  
0

Pencil Estimate Dollar Amount  
0.00

Project Name  
[Empty]

Project Number  
[Empty]

Record No.  
[Empty]

Creation Date  
[Empty]

Creator  
Alicia Howard

Status  
[Empty]

**DM Publish Path**

Attachments Comments Linked Records

No Attachments.

## 9 Pencil Estimate Dollar Amount can be entered at this step or can be filled in by the Project Resident in the next step

Create New Pencil Estimate - Project No. T201611601 - Google Chrome  
unifier-test.deldot.gov/bp/mod/bp/record/new/uxppa/1303/31371?\_uref=uuu504433630t3

### Create New Pencil Estimate

Save Draft More Actions

Pencil Estimate

**General**

Contract Reference \*  
T201611601

Estimate No.  
[Empty]

Period Start Date  
[Empty]

Period Cut Off Date \*  
MM/DD/YYYY

Time Used This Period  
0

Pencil Estimate Dollar Amount  
0.00

Project Name  
[Empty]

Project Number  
[Empty]

Record No.  
[Empty]

Creation Date  
[Empty]

Creator  
Alicia Howard

Status  
[Empty]

**DM Publish Path**

Attachments Comments Linked Records

No Attachments.

## 10 Click "Send"

The screenshot shows a web browser window with the URL `http://fier-test.deldot.gov/bp/mod/bp/record/new/uxppa/1303/31371?_uref=uuu504433630t3`. The page title is "Create New Pencil Estimate". The form contains several fields: "Project Reference" (1611601), "Project Name", "Project Number", "Record No.", "Creation Date", "Creator" (Alicia Howard), "Status", "Cut Off Date" (1/2025), "Estimate Dollar Amount" (0.00), and "Publish Path". A "Send" button is circled in orange in the top right corner. The "Attachments" section on the right shows "No Attachments".

## 11 Click "Send"

Note: This will send for WS Import which compiles the pay items and assigns a Pencil Estimate number. This step will take a few minutes. If it's still importing after 5 minutes, please submit a Support Request to notify the Unifier Team that it is stuck in import.

The screenshot shows the same "Create New Pencil Estimate" form as in the previous image, but with a "Workflow Action Details" modal open. The modal has a "Workflow Actions" dropdown set to "Submit" and a "Send For" dropdown set to "WS Import". The "To" field lists "Alicia Howard;Bradley Damtoft;Cassidy Blowers;Company Administrator;Jamison...". The "Due Date Details" section shows "Task Due Date" with an information icon and the text "Task Due Date is not available". The "Send" button in the modal is circled in orange.