



Subcontractor Approval 5.0 Revision Required

The purpose of this flow is to walk the record creator through making revisions on a Subcontractor Approval record.

- T2020TEST - Home
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 - Field Requ...
 - Project Co...
 - Project Esti...
 - Project Nat...
 - Project Sch...
 - Project We...

DelDOT > DOTS > T2020TEST

Project E

STEP 1/16

Click the + symbol to open a new project

+ Create

Item	Fiscal Year Obligated	Status	Creation Date	Creator	Record No.
	0.00	Active	04/02/2024 09:56 AM	Rose Coleman	PRJEST-0004
	0.00	Active	04/02/2024 09:48 AM	Cheryl DeGraff	PRJEST-0002
	0.00	Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
Construction Engineering Estimate	0.00	Active	04/01/2024 03:26 PM	Rose Coleman	PRJEST-0001

Total: 4

Self Help

Search by Name or Number...

Recent Locations

- T2020TEST
- T202400160
- TEST20221024
- T202201601
- T202304902
- T202304903
- T202466303
- T209901999
- T202366305
- T202301101
- T202300801
- T201609002
- TEST2019051200
- T201800402
- DeIDOT
- M&O
- T202005402
- T201607002
- T202207704
- T201707108

Key Locations

- Company Workspace
- DeIDOT

Bookmarks

No items to display.

STEP 2/16

Type the **Project Name** or **Number** or select from the **Recent Locations**

Click **Next** to proceed

Next →

				Record No.
<input type="checkbox"/>			Rose Coleman	PRJEST-0004
<input type="checkbox"/>	Active	04/02/2024 09:48 AM	Cheryl DeGraff	PRJEST-0002
<input type="checkbox"/>	Active	04/02/2024 09:55 AM	Rose Coleman	PRJEST-0003
<input type="checkbox"/>	Active	04/01/2024 03:26 PM	Rose Coleman	PRJEST-0001

Self Help

Project Sch...
Project We...

3

Total: 4

Subcontractor Approval

+ Create Actions Bulk Update View: All Records [edit] [refresh] [print] [search] [list] [refresh]

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date

STEP 3/16

Click **Construction Phase**

Click *Next* if already open

← Back Next →

Total: 0

Self Help



- Tasks
- Drafts
- Notifications
- Directory
- Support >
- General >
- Design Phase >
- Construction Phase
 - Field >
 - Contract Admini...**
 - Construction Ge... >
- Document Manager >
- Reports >
- Admin >

Subcontractor Approval

+ Create Actions Bulk Update View: All Records [edit] [refresh] [print] [search] [list] [help]

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
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Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
Total: 0							

STEP 4/16

Click Contract Administration

Click *Next* if already open

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Self Help

- Notifications
- Directory
- Support
- General
- Design Phase
- Construction Phase
 - Field
 - Contract Admin...
 - Notice to P...
 - Contracts ...
 - Change Or...
 - Contractor'...
 - General Co...
 - Pencil Esti...
 - Progress Es...
 - Project Clo...
 - Price Appr...
 - Request for...
 - Subcontrac...**
 - Submittals
 - Time Charg...
 - Construction G...

DelDOT > TEST20221024

Subcontractor Approval

+ Create Actions Bulk Update View: All Records

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
Total: 0							

STEP 5/16

Click Subcontractor Approval

Click Next of already open

← Back Next →

Total: 0

Self Help

- Design Phase
- Construction Phase
- Field
- Contract Admin...
- Notice to P...
- Contracts - ...
- Change Or...
- Contractor'...
- General Co...
- Pencil Esti...
- Progress Es...
- Project Clo...
- Price Appr...
- Request for...
- Subcontrac...

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Subcontractor Approval

+ Create Actions Bulk Update View: All Records

STEP 6/16

Double click the applicable record.
The status will be 'Revision_Required'

← Back

Record No.	Vendor Name	Vendor ID	Vendor Type	Contract No.	Status	Creator	Creation Date
SA-0001	American Flag Inc	AFLAG	Sub-Contractor	000001	In_Estimator_Review	Rose Coleman	06/10/2024 08:24 AM

Total: 1

Self Help

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Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Task Details

From
Rose Coleman

To
Bradley Damtoft;Cassidy Blowers;Cheryl DeGraff;Company Administrator;Diane Calloway;Jacqueline Johnston;Jie Huang;Karynn Butler;Kyle Pickett;Lim Tan;Prath Mehta;Rose...

Sent For
Review

Contract Info

Contract Reference	Original Contract Amount
T2020TEST	8,847,777.00
	Revised Contract Amount
	8,970,271.39

CC Information

CC List

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select in master and search for the vendor before selecting add to master list.

Subcontractor Record Type

In Master List Add to Master List

Vendor Details

Vendor	Vendor ID
	SDFI
Project Vendor Type	

Attachments Comments Linked Records

STEP 7/16

Click **Accept**

← Back


Information
No Attachments.

Self Help

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Contract Info

Contract Reference * ⓘ

000001 [icon] [x]

Original Contract Amount 0.00

Revised Contract Amount 0.00

Subcontractor Record Type

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select In Master List and search for the vendor before selecting add to master list.

Subcontractor Record Type * ⓘ

In Master List Add to Master List

Vendor Details

Vendor

ACKBAY [icon] [x]

Vendor ID ⓘ

ACKBAY

Vendor Name * ⓘ

... & Baynes LLC

Project Vendor Type * ⓘ

Sub-Contractor

Attachments Comments Linked Records Linked Mail Workflow Progr > [icon]

STEP 8/16

Click Comments

← Back

i

Information

No Attachments.



Self Help

Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Contract Info

Contract Reference * ⓘ

Original Contract Amount

Revised Contract Amount

Subcontractor Record Type

Please choose one of the following:

- In Master List - the subcontractor exists in Unifier and needs to be added to the project.
- Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to the project.

Note: If unsure, please select In Master List and search for the vendor before selecting.

Subcontractor Record Type * ⓘ

In Master List Add to Master List

STEP 9/16

Review any/ all comments detailing the required revisions.

To leave a comment, enter the comment in the text box and click **Post**

Click Next to proceed

[← Back](#) [Next →](#)

Vendor Details

Vendor

Vendor ID ⓘ

Vendor Name * ⓘ

Project Vendor Type * ⓘ

Attachments Comments Linked Records Linked Mail Workflow Progress

Information
 No Comments are available.

Self Help

Subcontractor Approval

Save Draft More Actions Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Contract Info

Contract Reference * ⓘ
000001

Original Contract Amount
0.00

Revised Contract Amount
0.00

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select In Master List and search for the vendor before selecting add to master list.

Subcontractor Record Type * ⓘ

In Master List Add to Master List

Vendor Details

Vendor
ACKBAY

Vendor ID ⓘ
ACKBAY

Vendor Name * ⓘ
... & Baynes LLC

Project Vendor Type * ⓘ
Sub-Contractor

STEP 10/16

Make changes to the upper form as needed. Fields that are white are editable in this step of the workflow.

Once all changes have been made, click Next to proceed

← Back Next →

i

Information

No Comments are available.

Subcontractor Approval

Save Draft

More Actions

Send

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

Attachments Comments Linked Records Linked Mail Workflow Progress

Contract Info

Contract Reference *

000001

Original Contract Amount

Revised Contract Amount

STEP 11/16

Click on a detail form to make edits, if the detail forms do not require revisions, **click Next to send this record** forward in the workflow

Next →

Clear

Post

Self Help

Subcontractor Record Type

Please choose one of the following:

1. In Master List - the subcontractor exists in Unifier and needs to be added to the project.
2. Add to Master List - the subcontractor DOES NOT exist in Unifier and needs to be added to both the master list and the project.

Note: If unsure, please select In Master List and search for the vendor before selecting add to master list.

Subcontractor Record Type *

In Master List Add to Master List

Vendor Details

Vendor

ACKBAY

Vendor ID

ACKBAY

Vendor Name *

in & Baynes LLC

Project Vendor Type *

Sub-Contractor



Information

No Comments are available.

Save Draft

More Actions

Send

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Address

☰ Add Actions ↕ ↻ 🖨️ 🔍 ☰

No. ▾	📎 ...	Pay Item	Section	Pay Item Name	Agreement Quantity	Agreement Unit Price

STEP 12/16

Click on a line item to make edits, or click Add to add a new Bid Pay Item

Once all edits have been made, or new Bid Pay Items have been added, click Next to proceed

← Back Next →



Information
No line items are available.

Self Help



No.	Pay Item	Section	Pay Item Name
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STEP 13/16

Click on the Non-Bid Pay Items or Address detail forms to make revisions.

If this record does not need any additional revisions, click *Next* to send this record forward in the workflow

Next →

Self Help



Information
No line items are available.



Save Draft

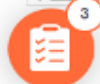
More Actions

Send

Subcontractor Approval

Subcontractor Approval Bid Pay Items **Non-Bid Pay Items** Address

No.	Non-bid Pay Item - Suffix	Existing Section	Existing Pay Item Name	Existing Pay Item Desc	Existing UOM
001					



Line Item Details Attachments Linked Records

General

STEP 14/16

Click on a line item to make edits, or click Add to add a new Non-Bid Pay Item

Once all edits have been made, or new Bid Pay Items have been added, click Next to proceed

[← Back](#) [Next →](#)

Existing Pay Item Desc

Existing Section

Price Approved?

Exclude?

Cancel Save Save & Add New

Self Help

Subcontractor Approval

Subcontractor Approval Bid Pay Items **Non-Bid Pay Items** Address

No.	Non-bid Pay Item - Suffix	Existing Section	Existing Pay Item Name	Existing Pay Item Desc	Existing UOM
001					



Save Draft More Actions **Send**

STEP 15/16

Click **Send**

Line Item Details Attachments

General

Existing Pay Item Number

Type a Short Description...

Non-bid Pay Item - Suffix

Existing Pay Item Name

Existing Pay Item Desc

Existing Section

Price Approved?

Exclude? ?

Cancel Save Save & Add New

Self Help

Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Add

Add Actions Refresh Print Search

No. Non-bid Pay Item - Existing Section

001

Save Draft More Actions Send

Attachments Linked Records

Self Help

Workflow Action Details

▼ Action Details

Workflow Actions *
Revision Complete

Send For
AE Review

To
Rose Coleman

▼ Due Date Details

Task Due Date

i

Task Due Date is not available

Cancel Send

STEP 16/16

Click **Send**

← Back



Subcontractor Approval

Subcontractor Approval Bid Pay Items Non-Bid Pay Items Add

Workflow Action Details

Workflow Actions * Revision Complete Send For AE Review

To Rose Coleman

Due Date Details

Task Due Date

You have completed this task.

Cancel Send

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