

# CORRESPONDENCE

Oracle Unifier Business Process User Guide

---



# Table of Contents

<b>1. Business Process Overview</b>	<b>2</b>
1.1 Understanding Correspondence	2
1.2 User Groups & Permissions	2
1.3 Business Process Flow	3
1.3.1 Outgoing Correspondence	4
1.3.2 Incoming Correspondence (not used by GAS)	4
1.4 Correspondence Form Explained	6
<b>1.4.1 Upper Form</b>	<b>6</b>
<b>1.4.2 Form Fields</b>	<b>7</b>
<b>1.4.3 Line Item Details</b>	<b>7</b>
<b>2. Step-by-Step Instructions</b>	<b>8</b>
2.1 Create Outgoing Correspondence Record	8
2.2 Acknowledge Correspondence Record	12
2.3 Clarify Correspondence Record	14
2.4 Create an Incoming Correspondence Record	16
2.5 Review a Correspondence Record	21
2.6 Revise a Correspondence Record	23
2.7 Additional Review Correspondence Record	26
2.8 Related Business Processes	27
2.9 Correspondence BP & Document Manager	27
<b>3. Business Unit Guidance</b>	<b>29</b>
<b>4. Appendix</b>	<b>29</b>
4.1 Getting Help & Support	29
4.2 Glossary of Terms	29
4.3 Abbreviations and Acronyms	29
4.4 Frequently Asked Questions	29



# 1. Business Process Overview

<b>Shell Level</b>	Project
<b>Workflow</b>	Yes
<b>Connected BPs</b>	Purchase Orders
<b>Partner Access</b>	No

## 1.1 Understanding Correspondence

Southern Company team members can use the Correspondence form to send communications and transmittals to contractors. This form replaces informal communication methods, such as multiple emails or phone calls, by formalizing and tracking communications.

In addition, for Business Units other than GAS, the Correspondence form will be used for formal contractor communication with the project team. It serves multiple purposes, such as:

- Submitting weekly deliverables.
- Requesting extended work hours.
- Proposing non-milestone-impacting schedule changes.
- Seeking review of a deliverable before its official submission some cases, the official submission of contract-related deliverables that do not need to be loaded into Documentum.

## 1.2 User Groups & Permissions

### Correspondence Outgoing from Southern Company to Contractor/Vendor

Role	Permissions	Shell Level
<b>All Project Users</b>	Authorized to initiate, resubmit, and cancel records, and receive notifications for tasks and record completions.	Project Level Shell
<b>Partner Contractors</b>	Authorized to edit, clarify, and acknowledge records, and receive task notifications to complete actions and records.	Project Level Shell
<b>Partner Engineers</b>	Authorized to edit, clarify, and acknowledge records, and receive task notifications to complete actions and records.	Project Level Shell

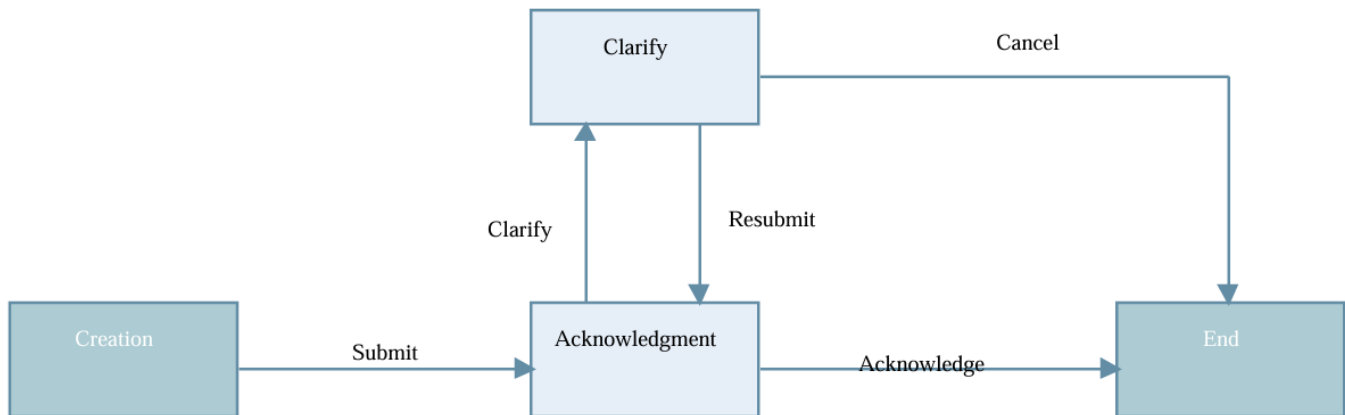
### Correspondence Incoming from Contractor/Vendor (not used by GAS)

Role	Permissions	Shell Level
<b>Partner Contractors</b>	Authorized to initiate, resubmit records, and receive notifications for tasks and completions.	Project Level Shell
<b>Partner Engineers</b>	Authorized to initiate, resubmit records, and receive notifications for tasks and completions.	Project Level Shell
<b>Construction Quality</b>	Authorized to edit, revise, cancel, complete records, and receive task notifications for record completion.	Project Level Shell

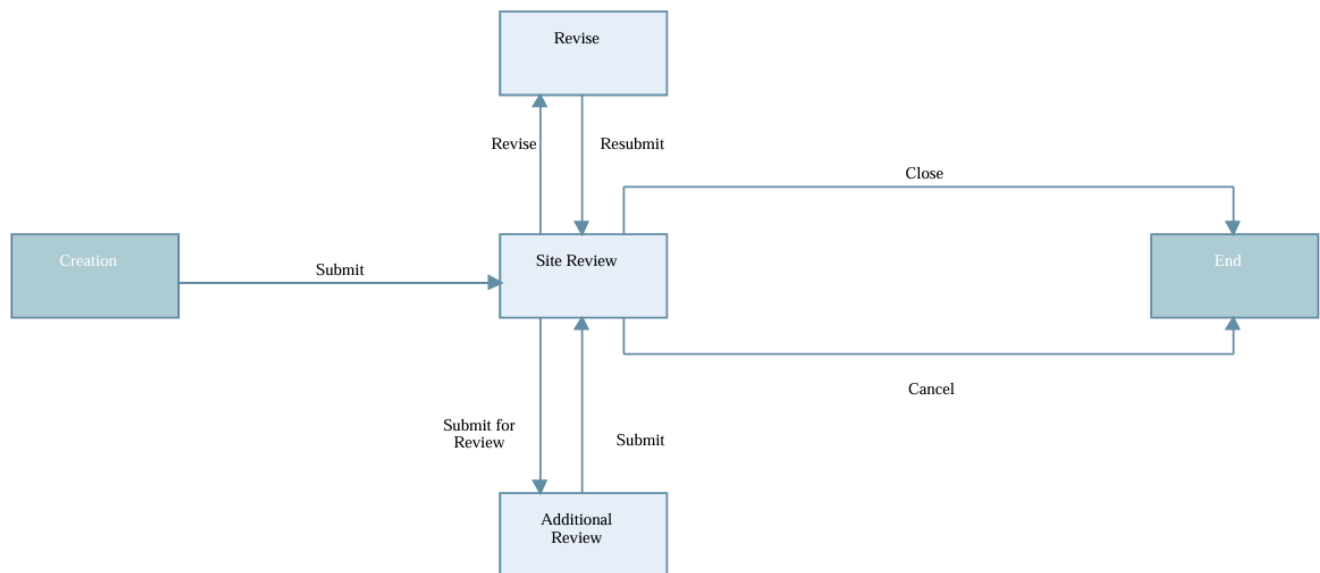


<b>Construction Team</b>	Authorized to edit, revise, cancel, complete records, and receive task notifications for record completion.	Project Level Shell
<b>All Project Users</b>	Authorized to edit records and receive task notifications for record completion.	Project Level Shell

### 1.3 Business Process Flow



#### *Business Process Flow for Outgoing Correspondence*



#### *Business Process Flow for Incoming Correspondence*



### 1.3.1 Outgoing Correspondence

Workflow Step	Summary
<b>Create</b>	The initiator completes the Correspondence form, attaching any necessary documents. Once everything is prepared, they submit the record to move it forward.
<b>Clarify</b>	The Partner User reviews the correspondence and can return it to the initiator for more details or request its cancellation if needed.
<b>Acknowledge</b>	The Partner User confirms receipt and acceptance of the information provided, acknowledging that the correspondence is complete.
<b>Close</b>	The correspondence record reaches this final step when the initiator cancels it from the Clarify step or when the Partner User acknowledges it from the Acknowledge step, marking the process as complete.

### 1.3.2 Incoming Correspondence (not used by GAS)

Workflow Step	Summary
<b>Create</b>	The initiator (Partner User) completes the Correspondence form, attaching any necessary documents. Once ready, they submit the record to begin the process.
<b>Revise</b>	If the Site Reviewer provides feedback, the initiator (Partner User) revises the Correspondence form, accordingly, making any necessary changes to the documents or information. After revisions, they resubmit the record.
<b>Site Review</b>	The Site Reviewer examines the Correspondence and its attachments, evaluating the information provided by the Partner User to decide on the next steps.
<b>Additional Review</b>	If needed, the Additional Reviewer(s) will further assess the Correspondence, considering the documents and any notes from the Site Review before proceeding.
<b>Close</b>	The correspondence record reaches this final step when the Site Reviewer either closes or cancels the record during the Site Review step, marking the process as complete.





## 1.4 Correspondence Form Explained

This form is divided into several blocks, containing mandatory and optional fields, as well as line items. Understanding these elements is crucial for accurately completing the form.

The diagram illustrates the structure of the 'Create New Correspondence' form. It features a main title 'Create New Correspondence' at the top, with two tabs: 'Correspondence' (active) and 'Document Details'. The form is organized into several sections:

- General** (Expanded): This section contains fields for 'Record No', 'Status', 'Title' (marked as 'Required'), 'Due Date' (with a calendar icon and the value '08/27/2024 06:49 AM'), 'Originator' (a dropdown menu showing 'Soumitra Mandal - All Project User' with a plus icon and a close icon), 'Creator' (a text field with 'Soumitra Mandal - All Project User'), 'Project Manager' (a text field with 'Company Administrator'), 'Creation Date', and 'Record Last Update Date'.
- Correspondence Details** (Collapsed): A section for detailed correspondence information.
- Correspondence Description** (Collapsed): A section for a detailed narrative about the correspondence.
- Record Information** (Collapsed): A section for organizational and project-specific information.

Annotations in the diagram include:

- Line Item Details**: Points to the 'Correspondence' tab.
- Form Fields**: Points to the input fields within the 'General' section.
- Form Blocks**: Points to the overall structure of the form, including the 'General' section and the collapsed sections below it.

### 1.4.1 Upper Form

The upper part of the Correspondence form is designed to efficiently capture and organize all the essential details needed for proper identification, classification, and tracking of the correspondence. It ensures that key information such as the purpose, type, related Purchase Order, involved departments, and external parties is systematically recorded. Additionally, it provides space to describe the content and purpose of the correspondence, all while linking it to the broader organizational context, facilitating clear communication and seamless workflow integration within the business process.

- **General:** This block captures essential metadata for the business process, including basic information like the record ID, title, status, and key dates. It helps in identifying and tracking the form through its lifecycle.
- **Correspondence Details:** This block captures essential metadata needed to classify, track, and route the correspondence accurately. It includes fields for specifying the purpose, type, related Purchase Order, involved departments, and external parties, ensuring the correspondence is properly linked to relevant processes and stakeholders.
- **Correspondence Description:** This block provides space for a detailed narrative about the correspondence. This section focuses on summarizing the content, purpose, and key points of the communication, offering a clear and concise explanation for future reference and understanding.
- **Record Information:** This block provides additional organizational and project-specific information, linking the project to its broader organizational context. It includes details about the organization, business unit, and program, facilitating better alignment and tracking within the organization.



### 1.4.2 Form Fields

The fields in these blocks behave according to their data elements:

- **Editable Fields:** These can be filled in or modified by the user.
- **Read-Only Fields:** These are automatically filled and cannot be changed by the user.
- **Record Number:** Automatically generated by the system.
- **Title:** A required input that must be provided by the user.

While optional fields are present in the form, this guide focuses on the mandatory fields required for form creation. Optional fields may include additional details like secondary objectives, detailed cost breakdowns, and stakeholder information, which can be filled in based on organizational needs (Reference [BU Portal](#) relevant to your organization).

### 1.4.3 Line Item Details

A line item is a detailed entry within a business process (BP) form, such as transactions or documents, that can be individually edited or deleted if the form is still editable.

- **Document Details (Line Item):** The Document Details section of the Correspondence form is designed to capture specific details about the related documents that are integral to the correspondence. This section allows users to identify the involved departments, document numbers, and any revisions or sheets associated with the correspondence. By providing this detailed document-level information, the form ensures that all relevant documentation is accurately referenced, facilitating clear communication, tracking, and alignment across different teams and stakeholders involved in the process.



## 2. Step-by-Step Instructions

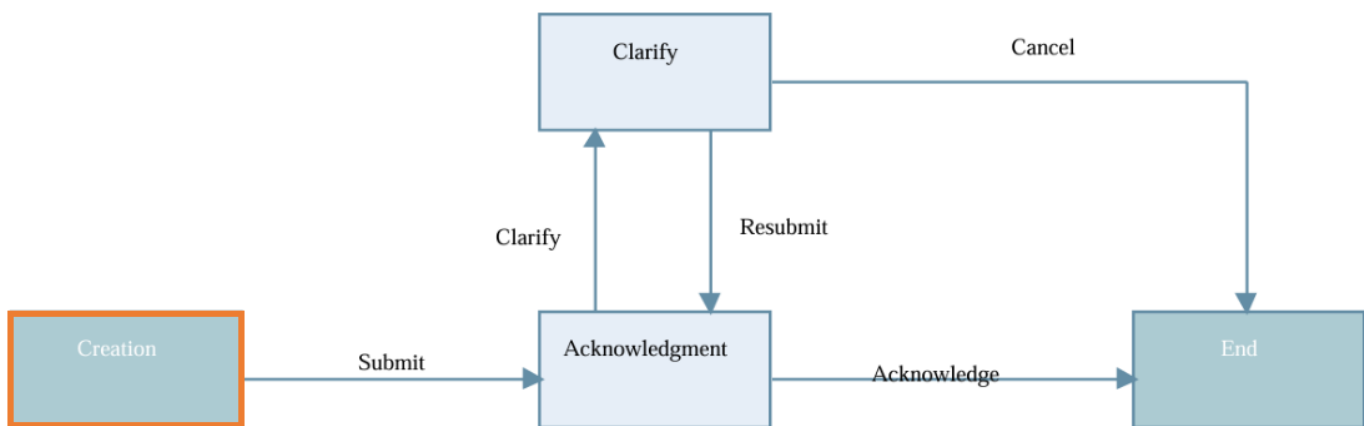
### 2.1 Create Outgoing Correspondence Record

#### User Roles

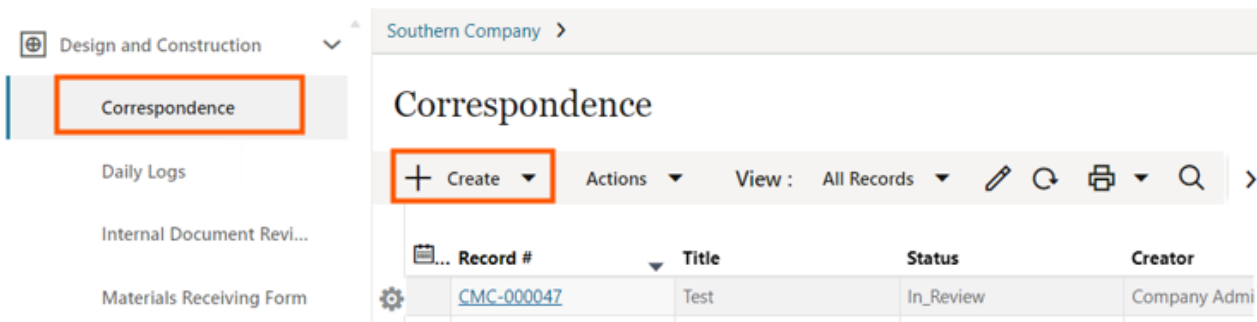
All Project Users

#### Workflow Step Summary

The initiator completes the Correspondence form, attaching any necessary documents. Once everything is prepared, they submit the record to move it forward.



1. In the left Navigator, click **Design & Construction > Correspondence**.
2. Click **+ Create**.



3. In the **General** section of the **Create New Correspondence** window, complete the following required field(s).

*Please note that while we haven't specifically highlighted the optional fields in this block, you are encouraged to complete them. Filling out these fields can help ensure that the form is fully detailed and accurately tracked.*

**Title**

The Title field is essential for providing a clear and concise summary of the correspondence. This title should be specific enough to give a quick understanding of the content or purpose of the correspondence at a glance (50-character limit).

The screenshot shows the 'Correspondence Document Details' form. The 'General' section is expanded, showing fields for Record No, Status, Title, Due Date, and a character count for the Title (50 Characters or less). The Title field is highlighted with an orange box. To the right, there is a 'Linked Records' section with an 'Add' button and a table with columns: Direct..., Type, Business Process, Record Number, and Rec.

4. In the **Correspondence Details** section, populate the following required fields.

*Please note that while we haven't specifically highlighted the optional fields in this block, you are encouraged to complete them. Filling out these fields can help ensure that the form is fully detailed and accurately tracked.*

**Correspondence Reason**

This field is crucial for accurately identifying the purpose of your communication.

- **For Approval:** Use when you require formal approval or authorization.
- **For Information Only:** Use when you are providing information without needing a response or action.
- **For Review & Comments:** Use when you seek feedback, suggestions, or comments.
- **Other:** Use for purposes not covered by the above options and specify the reason if possible.

**Correspondence Type**

This field categorizes the nature of the correspondence. By selecting the appropriate type, you help ensure that the communication is processed correctly and routed to the relevant department or stakeholders. The available options may vary depending on the selection made in the previous field.

**Discipline/ Department**

This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.

The screenshot shows the 'Correspondence Document Details' form with the 'Correspondence Details' section expanded. It highlights the 'Correspondence Reason' (a dropdown menu), 'Correspondence Type' (a dropdown menu), and 'Discipline / Department' (a dropdown menu) fields, all marked as required. Other visible fields include 'Oracle PO #' and 'Vendor/Supplier'. The 'Linked Records' section on the right is also visible.

5. In the Correspondence Description section, populate the **Description** field:

**Description**

In the Correspondence Description field, provide a concise summary of the key points, purpose, and context of the correspondence. Ensure the description clearly



communicates the essence of the message and any required actions, allowing for accurate processing and easy reference.

> General

> Correspondence Details

▼ Correspondence Description

Description \*

Required

6. Navigate to the **Document Details** tab and select **Add** followed by **Line Items**.

Create New Correspondence

Save Draft More Actions ▼ Send

Correspondence Document Details

Add ▼ Actions ▼ View Comments by: All

Folder

Line Item

File ID	Title	Discipline / Department	If Other Discipline/Department Impacted	Document

7. In the **General** section of the **Document Details** Line-Item Details, complete the following required field.

Name	This field inherits the file name of any attachment added here. It then becomes read-only
Title	Provide a brief and descriptive title that summarizes the purpose or content of the document. This helps in quickly identifying the focus of the review.
Discipline/Department	This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.



8. Complete all mandatory & optional fields of the **Document Details** line-item details.
  - a. **Save**
  - b. **Save & Add New**

9. Once all mandatory and optional fields for the **New Correspondence** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.

10. Verify **Submit** as the Workflow Action.
11. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for review.
  - i. The assignees can be searched using the **Select** function.
12. Click **Send**.



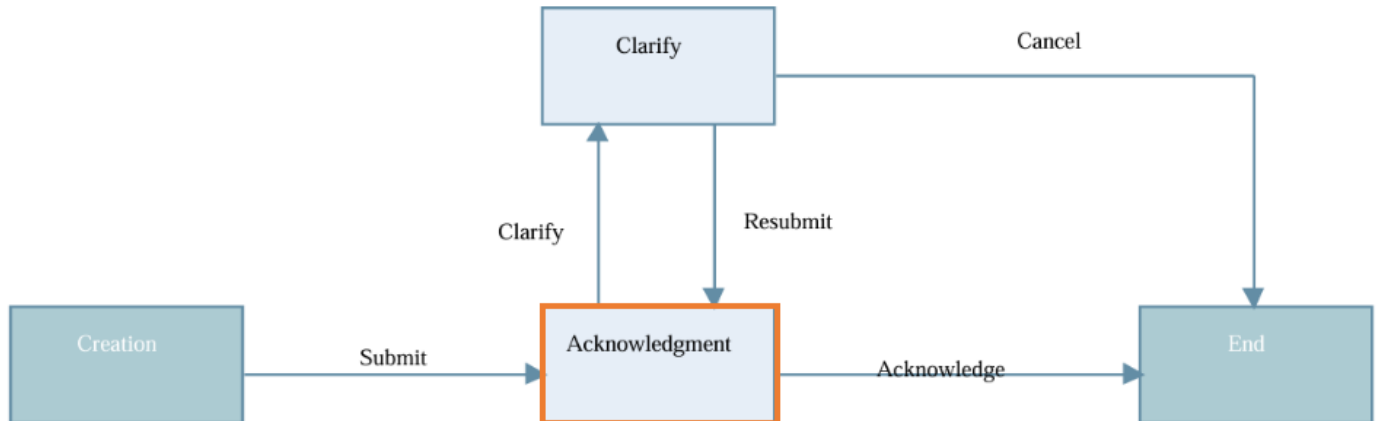
## 2.2 Acknowledge Correspondence Record

### User Roles

Partner Contractors & Partner Engineers

### Workflow Step Summary

The Partner User confirms receipt and acceptance of the information provided, acknowledging that the correspondence is complete.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Correspondence record to be reviewed.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
Project_Demo_TSS	Correspondence	CMC-000007	Training	06/26/2024 03:40 ...	Soumitra Mandal - ...	Acknowledgment		06/12/2024 04:17 ...	WF02 - Correspon...
Project_Demo_TSS	Design Change No...	DCN-000014	test 6/12	07/23/2024 11:56 ...	Baluvuri Kumar- Pr...	Prepare Revisions		06/11/2024 11:58 ...	WF01 - Design Ch...

3. The correspondence record form opens. In the top right corner of the form, click **Accept**.

Correspondence

Correspondence Document Details

Task Details

Comments Linked Records Workflow Progress Audit Log Reference Records

Decline More Actions Accept

4. Review the fields in the form and the **Correspondence Description** section of the correspondence window and complete the **Response** field.

### Response

Provide a reply or follow-up to the correspondence. Ensure your response directly addresses the content or questions raised and clearly outlines any necessary actions or decisions. This helps maintain clear communication and ensures that the correspondence is effectively managed and resolved.



▼ **Correspondence Description**

Description \*

Required

Response \*

Required

5. Once all mandatory and optional fields for the **Correspondence** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.
6. Select the Workflow Action.
  - a. **Clarify**: Select this workflow action if the details of the record need to be clarified by the initiator. When this action is selected the record will be sent for the action **Clarify**.
  - b. **Acknowledge**: Select this workflow action to confirm receipt and viewing of the record when no further action is required. When this action is selected, the record will be sent to **End**.

**Workflow Action Details** ×

▼ Action Details

Workflow Actions \* Send For

Select ▼

Select

Clarify

Acknowledge

7. In the **To** field
  - a. If the action **Acknowledge** is selected, the **To** field does not appear. The initiator will automatically be assigned for cc.
  - b. If the action **Clarify** is selected, the recipient in the **To** field becomes the initiator by default.
8. Click **Send**.

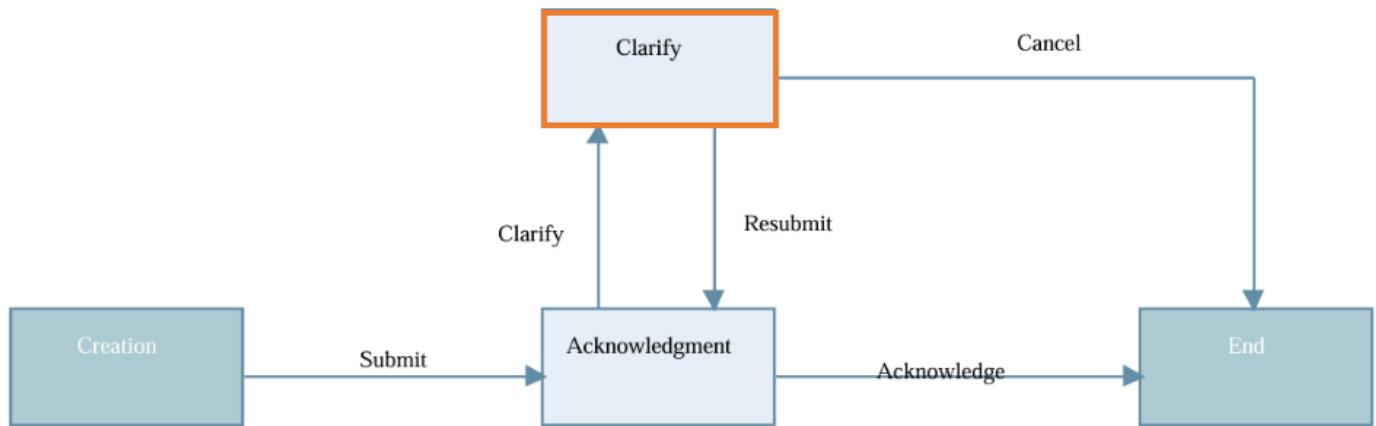
## 2.3 Clarify Correspondence Record

### User Roles

-

### Workflow Step Summary

The Partner User reviews the correspondence and can return it to the initiator for more details or request its cancellation if needed.



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Correspondence record to be clarified.

Tasks										
Tasks										
+ Create Actions View: All Tasks										
	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due	Received	Workflow Name
<input checked="" type="checkbox"/>	Project_Demo_TSS	Correspondence	CMC-000007	Training	06/26/2024 03:40 ...	Deepa Prakash Kv ...	Clarify		06/12/2024 04:45 ...	WF02 - Correspon...
<input checked="" type="checkbox"/>	Project_Demo_TSS	Action Items	AI-000037	Action Item 5/3		Soumitra Mandal - ...	Review		06/11/2024 04:01 ...	WF01 - Action It...
<input checked="" type="checkbox"/>	Project_Demo_TSS	Issues	ISS-000009	test	07/21/2024 09:10 ...	Soumitra Mandal - ...	Monitor		06/09/2024 09:13 ...	WF01 - Issues V01

3. The correspondence record form will open. In the top right corner of the form, click **Accept**.

Correspondence

Decline
More Actions
Accept

Correspondence
Document Details

Task Details

Comments
Linked Records
Workflow Progress
Audit Log
Reference Records

4. In the **General** section of the **Create New Correspondence** window, review the text in the required field Title and make any changes necessary to clarify.

### Title

The Title field is essential for providing a clear and concise summary of the correspondence. This title should be specific enough to give a quick understanding of the content or purpose of the correspondence at a glance (50-character limit).



Correspondence Document Details

**General**

Record No

Status

Title \*  Enter 50 or fewer characters.

Due Date

Linked Records

Add

Direct...	Type	Business Process	Record Number	Rec
-----------	------	------------------	---------------	-----

5. In the **Correspondence Details** section, review and update the following required fields, as necessary.

### Correspondence Reason

This field is crucial for accurately identifying the purpose of your communication.

- **For Approval:** Use when you require formal approval or authorization.
- **For Information Only:** Use when you are providing information without needing a response or action.
- **For Review & Comments:** Use when you seek feedback, suggestions, or comments.
- **Other:** Use for purposes not covered by the above options and specify the reason if possible.

### Correspondence Type

This field categorizes the nature of the correspondence. By selecting the appropriate type, you help ensure that the communication is processed correctly and routed to the relevant department or stakeholders. The available options may vary depending on the selection made in the previous field.

### Discipline/ Department

This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.

Correspondence Document Details

**Correspondence Details**

Correspondence Reason \*  Required

Correspondence Type \*  Required

Oracle PO #  Required

If Other Correspondence Type

Discipline / Department \*  Required

Vendor/Supplier

Linked Records

Add

Direct...	Type	Business Process	Record Number	Rec
-----------	------	------------------	---------------	-----

6. In the Correspondence Description section, review and update the **Description** field if necessary.





> General


> Correspondence Details

▼ Correspondence Description

Description \*

Required

7. Once all mandatory and optional fields for the **updated Correspondence** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.

8. Select the Workflow action:
  - a. **Resubmit:** Select this workflow action to resubmit the correspondence record for acknowledgment post clarification.
  - b. **Cancel:** Select this workflow to cancel the correspondence record and send for End.
9. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for review.
  - a. If the workflow action **Resubmit** is selected, the name of the assignees is to be typed or selected manually. The assignees can be searched using the **Select** function. 
  - b. If the workflow action **Cancel** is selected, the **To** field does not appear and the initiator is selected by default in the cc field.
10. Click **Send**.

## 2.4 Create an Incoming Correspondence Record

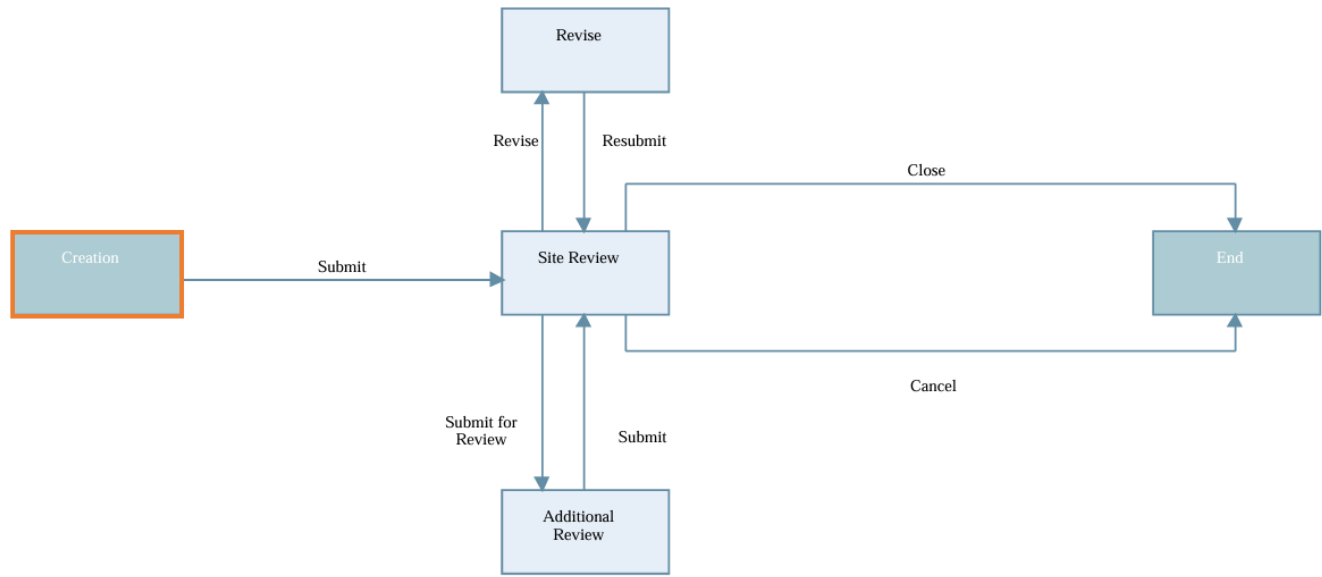
### User Roles

Partner Contractors & Partner Engineers

### Workflow Step Summary

The initiator (Partner User) completes the Correspondence form, attaching any necessary documents. Once ready, they submit the record to begin the process.

**Disclaimer: This workflow step does not apply to GAS.**



1. In the left Navigator, click **Design and Construction > Correspondence**.
2. Click **+ Create**.



3. In the **General** section of the **Create New Correspondence** window, enter text in the required field Title.

*Please note that while we haven't specifically highlighted the optional fields in this block, you are encouraged to complete them. Filling out these fields can help ensure that the form is fully detailed and accurately tracked.*

<b>Title</b>	The Title field is essential for providing a clear and concise summary of the correspondence. This title should be specific enough to give a quick understanding of the content or purpose of the correspondence at a glance (50-character limit).
--------------	--

The screenshot shows the 'Create New Correspondence' form. The 'General' section is expanded, showing fields for 'Record No.', 'Status', 'Title \*', and 'Due Date'. The 'Title' field is highlighted with a red box and contains the text '50 Characters or less'. The 'Due Date' field shows '06/24/2024 11:06 AM'. A 'Linked Records' section is visible on the right, showing a table with columns: Direct..., Type, Business Process, Record Number, and Rec.

4. In the **Correspondence Details** section, populate the following required fields.



Please note that while we haven't specifically highlighted the optional fields in this block, you are encouraged to complete them. Filling out these fields can help ensure that the form is fully detailed and accurately tracked.

### Correspondence Reason

This field is crucial for accurately identifying the purpose of your communication.

- **For Approval:** Use when you require formal approval or authorization.
- **For Information Only:** Use when you are providing information without needing a response or action.
- **For Review & Comments:** Use when you seek feedback, suggestions, or comments.
- **Other:** Use for purposes not covered by the above options and specify the reason if possible.

### Correspondence Type

This field categorizes the nature of the correspondence. By selecting the appropriate type, you help ensure that the communication is processed correctly and routed to the relevant department or stakeholders. The available options may vary depending on the selection made in the previous field.

### Discipline/Department

This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.

Direct...	Type	Business Process	Record Number	Rec

5. Navigate to the **Document Details** tab and select **Add** followed by **Line Items**.

To learn more about Document Details, see [Section 1.4](#).

Folder	Line Item	File ID	Title	Discipline / Department	If Other Discipline/Departm... Impacted

6. In the **General** section of the **Document Details** Line-Item Details, complete the following required field.

### Name

Enter the specific name of the document or item being reviewed. This should identify the subject of the review for all participants.







<b>Title</b>	Provide a brief and descriptive title that summarizes the purpose or content of the document. This helps in quickly identifying the focus of the review.
<b>Discipline/Department</b>	This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.


7. Complete all mandatory and optional fields of the **Document Details** line-item details.
  - a. **Save**
  - b. **Save & Add New**

8. Once all mandatory and optional fields for the **New Correspondence** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.





Add ▾ Actions ▾ View Comments by: All ▾ 

Name			File ID	Title	
 Attachments					


Line Item Details 

File ID


Name \* 

 ▾


Required

Title \* 

Required

Discipline / Department \* 

Type a Option Name... ▾



Required

9. Verify **Submit** as the Workflow Action.

10. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for review.

a. The assignees can be searched using the **Select** function. 

11. Click **Send**.



## 2.5 Review a Correspondence Record

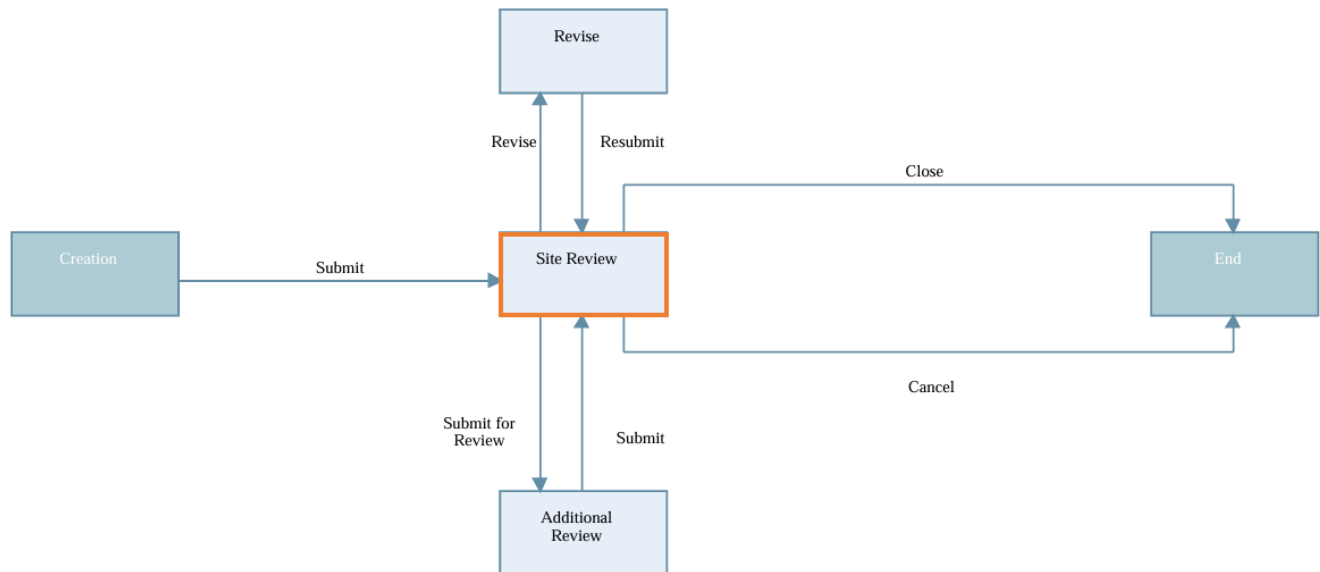
### User Roles

Construction Team and/or Construction Quality

### Workflow Step Summary

The Site Reviewer examines the Correspondence and its attachments, evaluating the information provided by the Partner User to decide on the next steps.

**Disclaimer: This workflow step does not apply to GAS.**



1. Click the Tasks option in the **Navigator**.

a. The **Task Log** will show available records.

2. Double-click the Correspondence record to be reviewed.

The screenshot shows the 'Tasks' table in the application. The table has columns for Project, Type, ID, Name, Date, User, Action, and Status. The first row is highlighted with an orange border, indicating the selected record for review.

Project	Type	ID	Name	Date	User	Action	Status
Project_Demo_TSS	Correspondence	CMC-000006	ABCD	06/25/2024 05:53 ...	Deepa Prakash Kv ...	Site Review	WF01 - Correspon...
Project_Demo_TSS	Correspondence	CMC-000005	test 11 June	06/25/2024 01:05 ...	Soumitra Mandal -...	Site Review	WF01 - Correspon...
Project_Demo_TSS	Nonconformance ...	NCR-000017	Test 3 Jun		Hariharanath Mag...	Recommendation	WF01 - Non safety...
Project_Demo_TSS	Action Items	AI-000033	Test		Soumitra Mandal -...	Action	WF01 - Action It...

3. The correspondence record form opens. In the top right corner of the form, click **Accept**.

The screenshot shows the 'Correspondence' form. In the top right corner, there are three buttons: 'Decline', 'More Actions', and 'Accept'. The 'Accept' button is highlighted with an orange border.

4. In the **Correspondence Details** block, complete the following required field.

### Discipline/ Department

This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.



**Note:** If the required discipline/department is not listed in the available options, select "Other" and manually enter the correct discipline/department name in the "If Other Discipline/Department" field.

5. In the **Correspondence Description** section, complete the **Response** field.

### Response

Provide a reply or follow-up to the correspondence. Ensure your response directly addresses the content or questions raised and clearly outlines any necessary actions or decisions. This helps maintain clear communication and ensures that the correspondence is effectively managed and resolved.

6. Once all mandatory and optional fields for the **Correspondence** are complete, click **Send** at the top right of the form.

- a. The **Workflow Actions Details** pop-up window will display.
- b. You may also click **Save Draft** to revisit later.

7. Select the **Workflow Action**.

- a. **Revise:** Choose this workflow action if the record needs to be returned to the initiator for revisions.  
**Submit for Review:** Choose this workflow action if the record requires further review by additional Southern Company personnel.
- b. **Cancel:** Choose this workflow action to cancel the correspondence record, sending it to its final state.
- c. **Close:** Choose this workflow action when no further correspondence is required for the record. The record will be closed and moved to its final state, making it viewable but not editable by users.

8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for further steps.
  - a. If the actions **Close** or **Cancel** are selected, the **To** field does not appear. The initiator will automatically be assigned for cc.
  - b. If the action **Revise** is selected, the recipient in the **To** field becomes the initiator by default.
  - c. If the action **Submit for Review** is selected, the name of the reviewers is to be typed or selected manually. The assignees can be searched using the **Select** function.
9. Click **Send**.

## 2.6 Revise a Correspondence Record

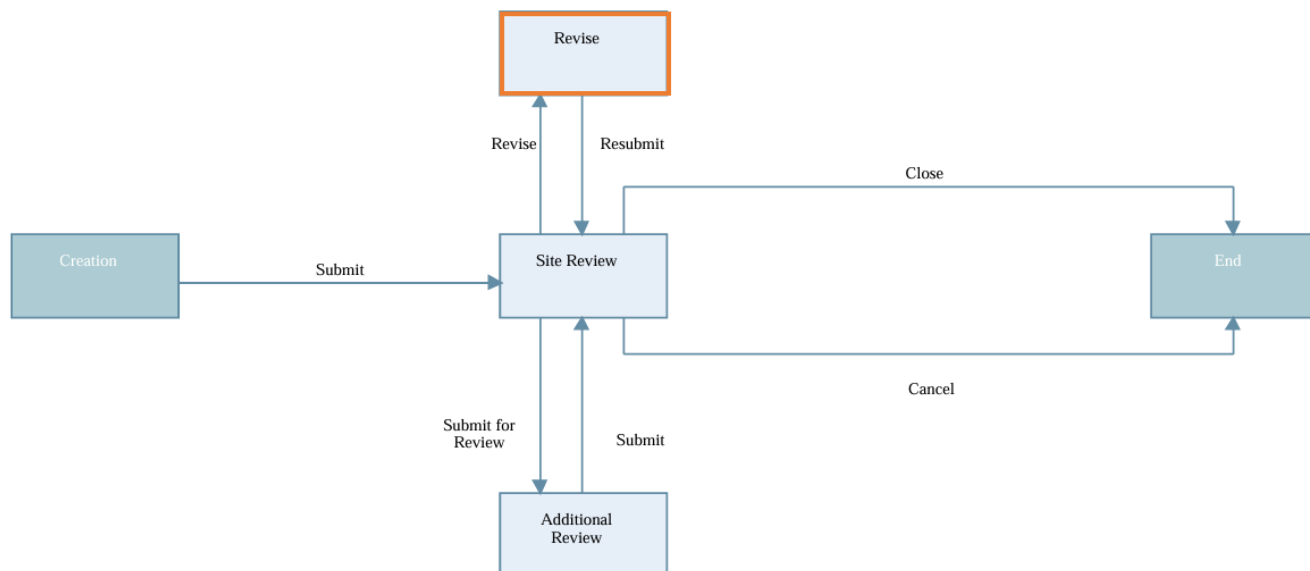
### User Roles

Partner Contractors & Partner Engineers

### Workflow Step Summary

If the Site Reviewer provides feedback, the initiator (Partner User) revises the Correspondence form, accordingly, making any necessary changes to the documents or information. After revisions, they resubmit the record.

**Disclaimer: This workflow step does not apply to GAS.**



1. Click the Tasks option in the **Navigator**.





a. The **Task Log** will show available records.

2. Double-click the Correspondence record to be revised to open it.

Origin	Business Process	Record Number	Title	Record Due	From	Sent For	Task Due	Received	Workflow Name
Project_Demo_TSS	Correspondence	CMC-000006	ABCD	06/25/2024 05:53 ...	Pilli Anusha- Const...	Revise	06/12/2024 01:01 ...	WF01 - Correspon...	
Project_Demo_TSS	Design Change No...	DCN-000014	test 6/12	07/23/2024 11:56 ...	Baluvuri Kumar- Pr...	Prepare Revisions	06/11/2024 11:58 ...	WF01 - Design Ch...	

3. The correspondence record form opens. In the top right corner of the form, click **Accept**.

Correspondence

Correspondence Document Details

Task Details

Comments Linked Records Workflow Progress Audit Log Reference Records

4. Review and revise the following mandatory fields based on the reviewer's response.

Title	The Title field is essential for providing a clear and concise summary of the correspondence. This title should be specific enough to give a quick understanding of the content or purpose of the correspondence at a glance (50-character limit).
Correspondence Reason	This field is crucial for accurately identifying the purpose of your communication. <ul style="list-style-type: none"><li>▪ <b>For Approval:</b> Use when you require formal approval or authorization.</li><li>▪ <b>For Information Only:</b> Use when you are providing information without needing a response or action.</li><li>▪ <b>For Review &amp; Comments:</b> Use when you seek feedback, suggestions, or comments.</li></ul> <b>Other:</b> Use for purposes not covered by the above options and specify the reason if possible.
Correspondence Type	This field categorizes the nature of the correspondence. By selecting the appropriate type, you help ensure that the communication is processed correctly and routed to the relevant department or stakeholders. The available options may vary depending on the selection made in the previous field.
Discipline/ Department	This field identifies the specific discipline or department within Southern Company that is associated with the correspondence. Accurately selecting the discipline or department helps in linking the correspondence to the correct team, ensuring proper tracking and accountability throughout the communication process.
Description	In the Correspondence Description field, provide a concise summary of the key points, purpose, and context of the correspondence. Ensure the description clearly communicates the essence of the message and any required actions, allowing for accurate processing and easy reference.


5. Once all mandatory and optional fields for the **Correspondence** are complete, click **Send** at the top right of the form.

a. The **Workflow Actions Details** pop-up window will display.

b. You can also click **Save Draft** to revisit later.

6. Verify the Workflow Action as **Resubmit**



7. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for further steps.
  - a. The assignees can be searched using the **Select** function. 
8. Click **Send**.



## 2.7 Additional Review Correspondence Record

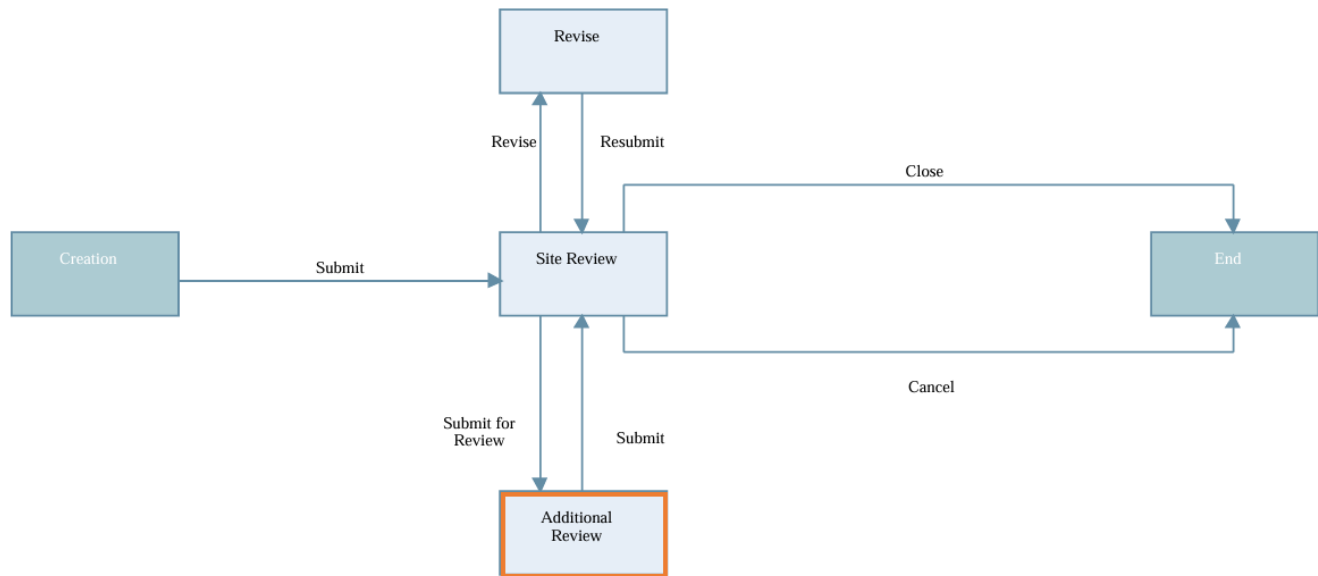
### User Roles

All Project Users

### Workflow Step Summary

If needed, the Additional Reviewer(s) will further assess the Correspondence, considering the documents and any notes from the Site Review before proceeding.

**Disclaimer: This workflow step does not apply to GAS.**



1. Click the Tasks option in the **Navigator**.
  - a. The **Task Log** will show available records.
2. Double-click the Correspondence record to be reviewed.

Tasks										
+ Create   Actions   View: All Tasks   [Edit] [Refresh] [Print] [Search] [Filter]										
	Origin	Business Process	Record Number	Title	Record Date	From	Sent for	Task Date	Received	Workflow Name
✓	Project_Demo_TSS	Correspondence	CMC-000006	ABCD	06/25/2024 05:53 ...	Pilli Anusha- Const...	Additional Review		06/12/2024 03:01 ...	WF01 - Correspon...
✓	Project_Demo_TSS	Action Items	AI-000036	test 7 june part 3		Baluvuri Kumar- Pr...	Review		06/09/2024 10:00 ...	WF01 - Action It...

3. The correspondence record form opens. In the top right corner of the form, click **Accept**.

Correspondence

Correspondence   Document Details

Task Details

Comments   Linked Records   Workflow Progress   Audit Log   Reference Records

Decline

More Actions

Accept

4. Review the details of the correspondence record.
5. Once all mandatory and optional fields for the **Correspondence** are complete, click **Send** at the top right of the form.
  - a. The **Workflow Actions Details** pop-up window will display.
  - b. You can also click **Save Draft** to revisit later.

## 6. Verify the workflow action as **Submit**.

## 7. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to send the record to for further steps.

- The assignees can be searched using the **Select** function.
- The record shall be sent to the **Site Reviewer**.

## 8. Click **Send**.

## 2.8 Related Business Processes

The Correspondence business process is related to other business processes within Unifier. The details of the interaction between the BPs in explained in the table below:

Workflow Step	Summary
<b>Purchase Orders</b>	The Purchase Orders business process is connected to the Correspondence BP by enabling formal communication between contractors and the project team regarding purchase order-related matters. This connection allows for the tracking and formalization of requests, updates, or deliverable submissions linked to purchase orders, ensuring that all correspondence is documented and easily accessible without relying on informal communication methods like emails or phone calls.

## 2.9 Correspondence BP & Document Manager

This business process is designed to automatically publish its records, along with comments and attachments, to the Document Manager at the **project shell only**. This produces a detailed audit trail of the record information through the business process (*for both workflow and non-workflow processes*). Users can open these records and their information by following the steps below.

- In the left **Navigator**, click **Document Manager**
- Click **Documents**
- In the central pane, navigate to the following folder:
  - Phase 5 - Monitoring & Controlling Phase > Correspondence.**



Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase

Name	Upload By	Upload Date	Location	BP	Document URL
Action Items			/Phase 5 - Monitoring & Controlling Phase		
Assessments			/Phase 5 - Monitoring & Controlling Phase		
Change Management			/Phase 5 - Monitoring & Controlling Phase		
Compliance			/Phase 5 - Monitoring & Controlling Phase		
Construction Management			/Phase 5 - Monitoring & Controlling Phase		
Correspondence			/Phase 5 - Monitoring & Controlling Phase		
Cost Management			/Phase 5 - Monitoring & Controlling Phase		

- The generated .pdf workflow document will be named in the format **WF\_Record Number\_Record Title** where “WF” is the BP workflow name, the “Record Number” is the Unifier-generated record number, and the “Record Title” is the title of the workflow record.
- Any files that were attached to the workflow will include the **paper clip icon** in the “BP” column, if the file is uploaded directly to the displayed Document Manager folder; it will not show the paper clip icon in the “BP” column.

Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Correspondence

Name	Upload By	Upload Date	Location	BP	Document URL
Contractor Miscellaneous ...	Jaluvuri Kumar - Proje...	05/07/2024 0...	/Phase 5 - Monitoring & Controlling Ph...		<a href="https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386549">https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386549</a>
Contractor Miscellaneous Co...	Deepa Prakash Kv - Part...	06/12/2024 05...	/Phase 5 - Monitoring & Controlling Phase...		<a href="https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387698">https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387698</a>

- Users may sort the list of files at any level within the Document Manager folders by clicking on the column label. An indicator will be displayed on the right side of the sorted column. Re-clicking on a sorted column will re-sort the list in the opposite sort order (i.e., ascending to descending or descending to ascending).

Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Correspondence

Name	Upload By	Upload Date	Location	BP	Document URL
Contractor Miscellaneous Co...	Sort Ascending	07/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		<a href="https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386549">https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386549</a>
Contractor Miscellaneous Co...	Sort Descending	12/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		<a href="https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387698">https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387698</a>

Columns

Lock after this Column



## 3. Business Unit Guidance

This user guide offers baseline instructions. For localized guidance, users should visit their respective business unit portals (accessible via the link below).

[EPPM Training Homepage](#)

## 4. Appendix

### 4.1 Getting Help & Support

If you encounter any issues or require assistance, there are two primary channels available:

Business Unit Administrator	IT Support
For process-related inquiries or issues, users can reach out to the designated Business Unit Administrator. They are equipped to provide guidance and support specific to the business process within Oracle Unifier.	For technical issues or challenges beyond the scope of the Business Unit Administrator's expertise, users can contact IT Support. They can assist with platform-related technical difficulties, account access problems, or any other IT-related concerns.

### 4.2 Glossary of Terms

Here are some clear definitions for key concepts and terminology essential for navigating Oracle Unifier.

Incoming Correspondence	Correspondence record sent by the contractors/ vendors to the Southern Company Project Team
Outgoing Correspondence	Correspondence record sent by the Southern Company project team to contractors/ vendors

### 4.3 Abbreviations and Acronyms

Here, you will find a handy reference list of commonly used abbreviations and acronyms throughout your Oracle Unifier experience.

BP	Business Process
PO	Purchase Order

### 4.4 Frequently Asked Questions

1. What is the purpose of the Correspondence form in Oracle Unifier?



Southern Company team members use the Correspondence form to send formal communications and transmittals to contractors, replacing informal methods like emails or phone calls. It helps in formalizing and tracking communications.

**2. Who can use the Correspondence form?**

Southern Company team members can use the Correspondence form to communicate with contractors. For Business Units other than GAS, it is also used by the contractor for formal contractor communication with the project team.

**3. What types of communications can be sent using the Correspondence form?**

The form can be used for various purposes, including submitting weekly deliverables, requesting extended work hours, proposing non-milestone-impacting schedule changes, and seeking a review of a deliverable before its official submission.

**4. How does the Correspondence form improve communication?**

By formalizing and tracking communications, the Correspondence form ensures that all communications are documented and easily accessible, reducing the reliance on multiple emails or phone calls.

**5. Can the Correspondence form be used for official submissions of contract-related deliverables?**

Yes, the Correspondence form can be used for the official submission of contract-related deliverables that do not need to be loaded into Documentum.

**6. Is the Correspondence form mandatory for all communications with contractors?**

While it is highly recommended to use the Correspondence form for formal communications, informal methods may still be used for less critical communications. However, using the form ensures better tracking and documentation.

**7. How do I submit a weekly deliverable using the Correspondence form?**

To submit a weekly deliverable, fill out the Correspondence form with the necessary details and attach the deliverable file. Then, send the form to the relevant contractor or project team member.

**8. What should I do if I need to request extended work hours?**

Use the Correspondence form to formally request extended work hours. Provide the details of the request, including the reason for the extension and the proposed new work hours, and send it to the appropriate contractor or project team member for approval.