

DESIGN CHANGE NOTICE

Oracle Unifier Business Process User Guide



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1. Business Process Overview

Shell Level	Project Level
Workflow	Yes
Connected BPs	Internal Documents Reviews, Submittals, Correspondence, Requests for Information, Project Change Requests, and Issues
Partner Access	Yes

1.1 Understanding Design Change Notice

The Design Change Notice (DCN) is a formal process used in project management to communicate advanced engineering design changes from the Engineering team to the Construction team before official drawing revisions are made. It serves to highlight important changes in the design and ensures that all affected parties are notified early. The DCN is tracked and managed throughout the entire project lifecycle, from initiation to closeout, at the project shell level.

DCNs can be created manually because of related processes such as Requests for Information (RFI), Project Change Requests (PCR), Correspondence, or Issues. The key benefits of the DCN process include:

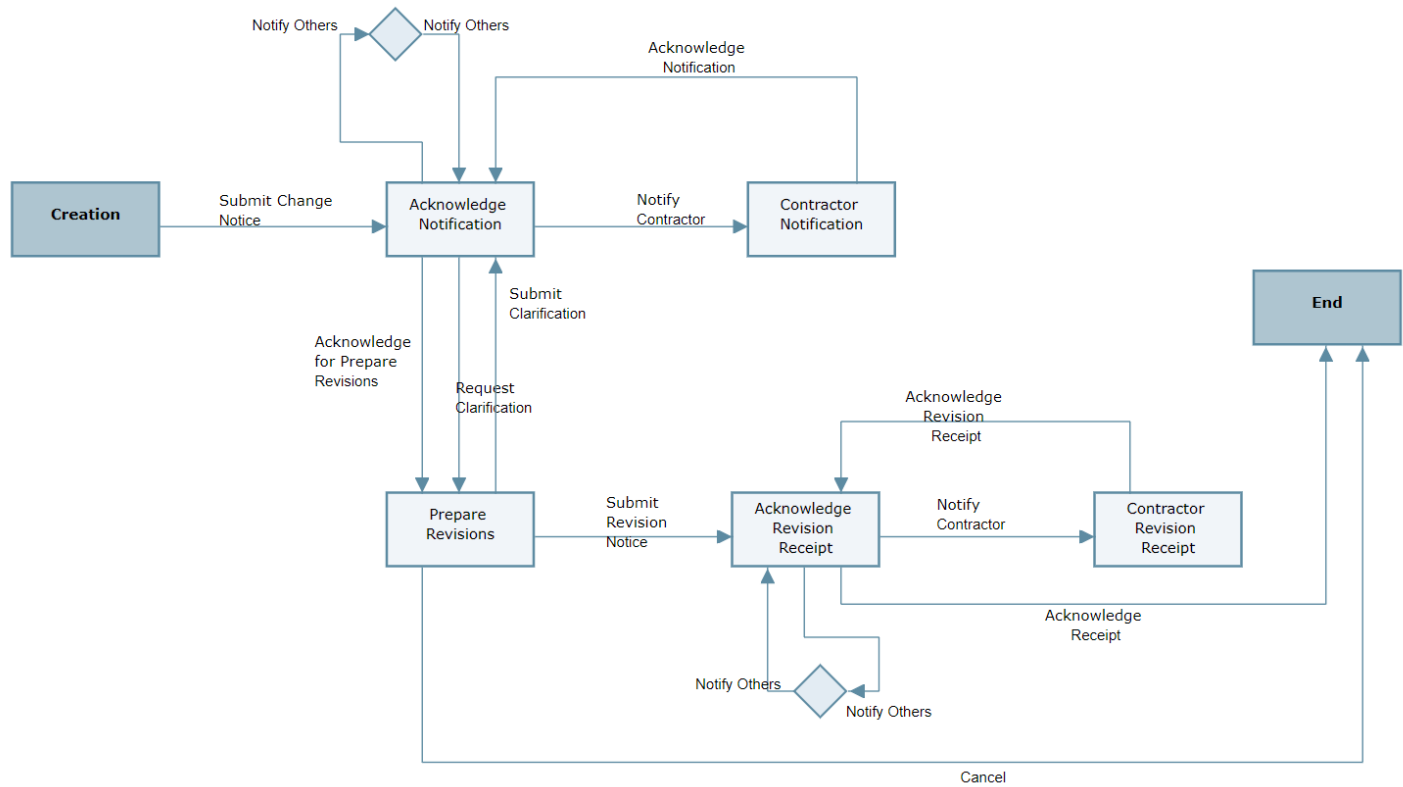
- **Early Notification:** Allows for timely communication of design changes to all relevant stakeholders.
- **Traceability:** Provides a record of all design changes within a project, ensuring that any modifications are documented and can be referenced throughout the project.

1.2 User Groups & Permissions

Role	Permissions	Shell Level
(Initiator) Project Engineers, Track Leads, Project Managers, Partner Users	Can initiate, edit, and act on records. Receives notification of task.	Project Level Shell
(Coordinator) Project Engineers, Project Managers, Track Leads	Can minimally edit and act on records. Receives notification of task.	Project Level Shell
(Contractor) Partner Contractors, Partner Engineers	Can act on records. Receives notification of task.	Project Level Shell
(Project Team) All Project Users	Can add general comments.	Project Level Shell



1.3 Business Process Flow

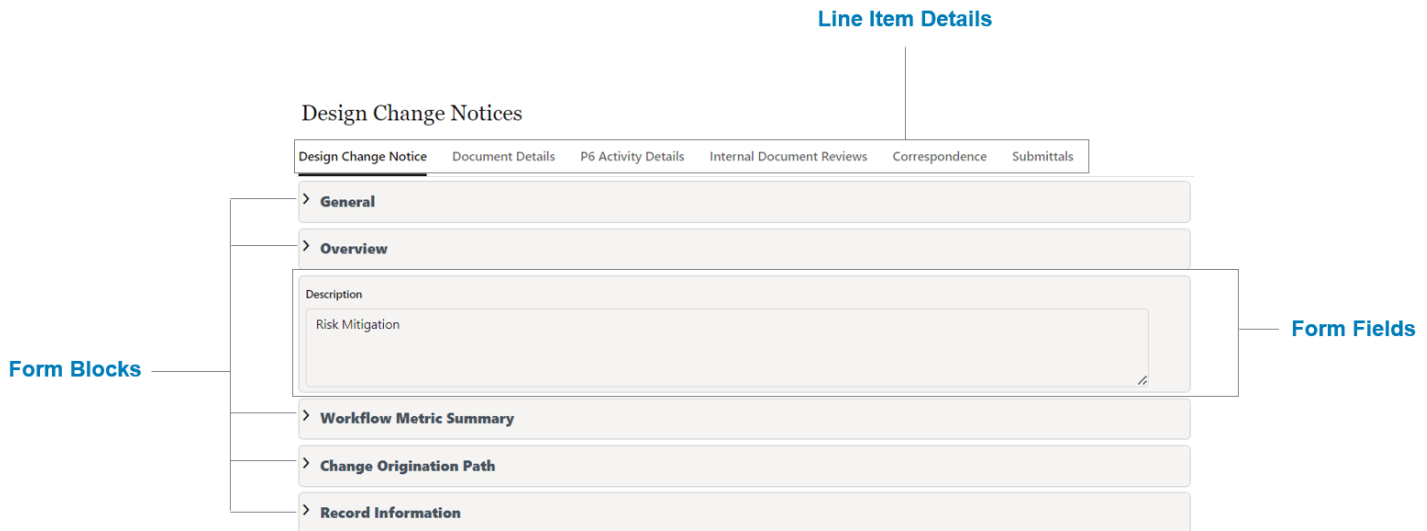


Workflow Step	Summary
Creation	The Initiator begins by filling out the DCN form, ensuring all necessary information, including the Document Details section, is completed. Once ready, the Initiator submits the form to start the DCN process.
Acknowledge Notification	The Coordinators are notified about the DCN and must acknowledge receipt. They then choose one of the following actions: a) Notify the Contractor, b) Request further clarification from the Initiator, or c) Acknowledge the notice and send the record back to the Initiator for design revisions.
Contractor Notification	The Contractor is informed that a design change notice has been issued. They review the notice, acknowledge it, and then return the acknowledgment to the Coordinators for further processing.
Prepare Revisions	If the Coordinator has requested clarification or revisions, the Initiator updates the DCN with the required changes. Once all clarifications are addressed, the Initiator revises the design and submits the updated DCN back to the Coordinator. At this stage, the Initiator also has the option to cancel the design change if necessary.
Acknowledge Revision Receipt	The Coordinators are notified that the design has been updated. They review and acknowledge the revision and, if needed, notify the Contractor of the changes. After all steps are completed, the Coordinators acknowledge the revision receipt and send the record to the final step.
Contractor Revision Receipt	The Contractor is notified of the updated design changes. They review the revisions, acknowledge the notification, and return the record to the Coordinator.
Close	At this point, the DCN process is complete, and the record has reached its final stage. The DCN can no longer be edited, and a record of it is stored for future reference.



1.4 Design Change Notices 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.



1.4.1 Form Blocks

The upper part of the form is divided into four blocks, each consisting of rows of input fields. These blocks are designed to organize the information efficiently.

- **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.
- **Overview:** The Overview block is designed to capture the fundamental details of the Design Change Notice (DCN). It includes key information that explains why the change is being proposed, who is involved, and the core aspects of the design change. This block helps provide context for the DCN, ensuring that stakeholders understand the reasons behind the design modification and the key participants who need to act or be informed.
- **Workflow Metric Summary:** The Workflow Metric Summary block tracks the progress and key actions taken in the DCN workflow. It provides a snapshot of the status, including important details such as when specific actions were completed and by whom. This block is crucial for monitoring the flow of the DCN through its lifecycle, ensuring that all required steps are followed and that the DCN is moving through the approval process as expected.
- **Change Origination Path:** The Change Origination Path block links the DCN to other business processes, providing a clear record of what triggered the design change. It enables users to reference related records, such as Requests for Information (RFI) or Project Change Requests (PCR), to ensure that the design change is properly documented, and its origin is traceable. This block helps maintain transparency by showing how the DCN connects to other critical processes in the project.
- **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.

Name	File ID	Title	Discipline/Department Impacted	Document #	Revision #	Revis
Attachments						

- **Document Details (Line Item):** The Document Details Line Item block captures specific information about the documents and files associated with the Design Change Notice (DCN). This section is essential for tracking the supporting documentation that relates to the design change, such as revised drawings, technical specifications, or other materials impacted by the change. It allows users to attach relevant files, provide document identifiers, and specify which departments or disciplines are affected by the design modification. This block ensures that all necessary documentation is organized and easily accessible for stakeholders who need to review the design changes, enhancing clarity and accountability throughout the process.
- **P6 Activity Details:** The P6 Activity Details Line Item block allows users to track how the design change impacts the project schedule by linking it to specific P6 activities. This section is essential for managing project timelines, as it helps identify which tasks or activities may need adjustments due to the design change. Users can record the planned start and finish dates for impacted activities, link them to relevant P6 activity IDs, and document any comments related to how the changes affect the project's schedule. This block provides a clear connection between the design change and the project's overall timeline, ensuring that any adjustments to activities are accounted for and tracked in both the design and project management systems.



2. Step-by-Step Instructions

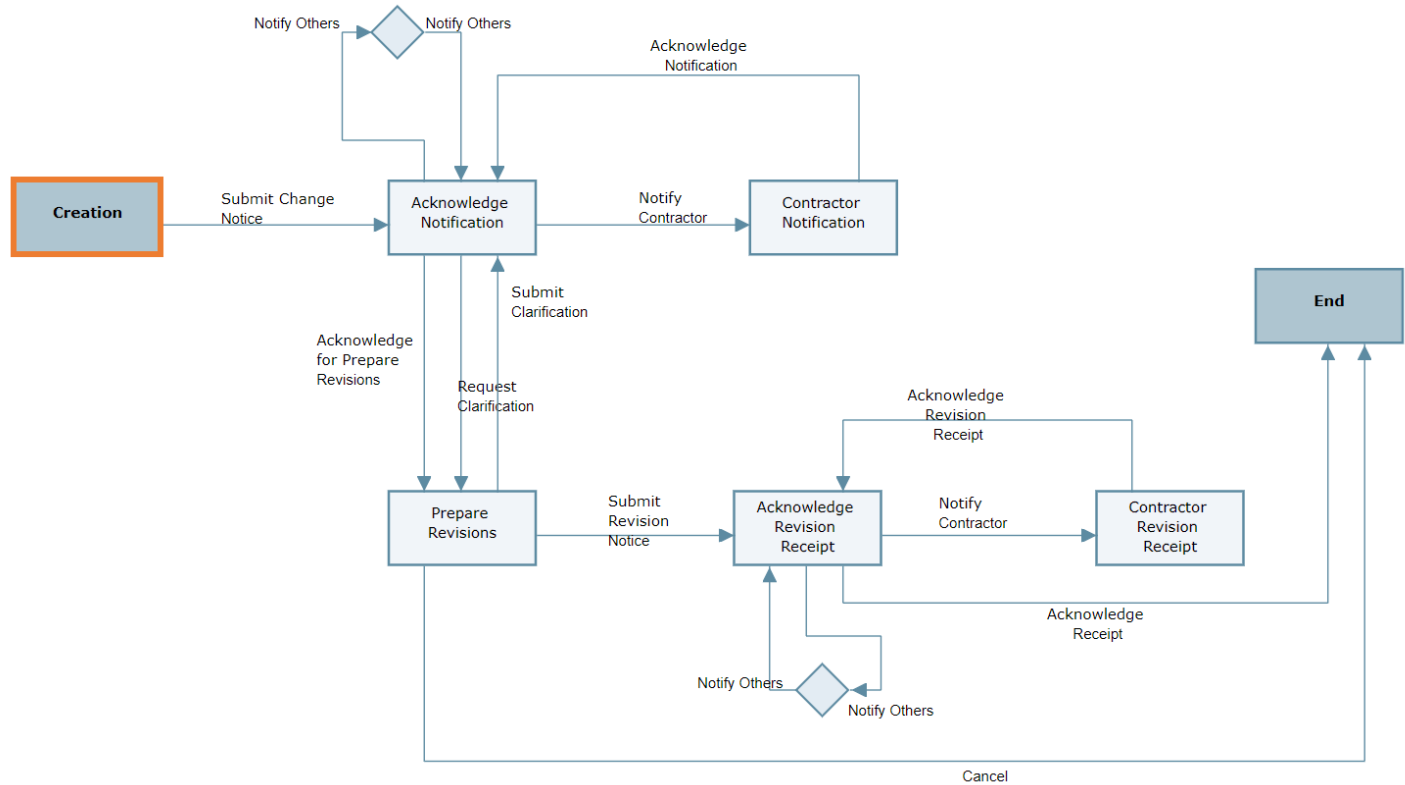
2.1 Create a Design Change Notice

User Roles

Project Engineers, Track Leads, Project Managers, Partner Users (Initiator)

Workflow Step Summary

The Initiator begins by filling out the DCN form, ensuring all necessary information, including the Document Details section, is completed. Once ready, the Initiator submits the form to start the DCN process.



1. In the left Navigator, click **Change Management > Design Change Notice**.
2. Click **+ Create**.

Tasks	Design Change Notices
Notifications	+ Create Actions View: All Records
Drafts	
Shell Access Request	
Document Manager	
Information	
Project Planning and I...	
Cost Details	
Design and Constructi...	
Monitoring and Coord...	
Change Management	
Change Order	
Design Change ...	
Project Change R...	

Record #	Status	Title	Creator	Originator	Creation Date	Reason Code	Description
DCN-000017	Open	test 6/17 pt 3	Rashmi Singh-Project M...	Rashmi Singh-Project M...	06/17/2024 12:28 AM	Corrected Design	test
DCN-000016	Notify_Acknowledged	test 6/17 pt 2	Rashmi Singh-Project M...	Rashmi Singh-Project M...	06/16/2024 10:39 PM	Corrected Design	test
DCN-000015	Notify_Acknowledged	Test 6/17	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	06/16/2024 10:02 PM	Corrected Design	test
DCN-000014	Open	test 6/12	Deepa Prakash Kv - Part...	Deepa Prakash Kv - Part...	06/11/2024 11:57 PM	Corrected Design	test
DCN-000013	Notify_Acknowledged	test 12 june	Rashmi Singh-Project M...	Rashmi Singh-Project M...	06/11/2024 11:32 PM	Corrected Design	test
DCN-000012	Open	test 11 june	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	06/10/2024 10:13 PM	Corrected Design	test
DCN-000011	Open	test 7 june	Rashmi Singh-Project M...	Rashmi Singh-Project M...	06/07/2024 03:06 AM	New Design Within Scope	test
DCN-000010	Open	test	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	06/07/2024 01:29 AM	Notification of New Dra...	test
DCN-000009	Open	u	Rashmi Singh-Project M...	Rashmi Singh-Project M...	05/13/2024 03:55 AM	Design Changed Due to ...	-
DCN-000008	Open	For exit point validation	Deepa Prakash Kv - Part...	Deepa Prakash Kv - Part...	05/09/2024 05:36 AM	New Design and Additio...	
DCN-000007	Notify_Acknowledged	ABCD	Rashmi Singh-Project M...	Rashmi Singh-Project M...	04/26/2024 03:10 AM	Notification of New Dra...	0
DCN-000006	Final_Acknowledged	Test	Deepa Prakash Kv - Part...	Deepa Prakash Kv - Part...	04/02/2024 11:30 PM	New Design and Additio...	Test
DCN-000005	Open	A	Hariharanath Maganti- P...	Hariharanath Maganti- P...	03/15/2024 01:56 AM	Corrected Design	ETC
DCN-000004	Final_Acknowledged	Test	Rashmi Singh-Project M...	Rashmi Singh-Project M...	03/14/2024 12:39 AM	Design Changed Due to ...	Test
DCN-000003	Open	Test 03	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	03/13/2024 09:58 PM	New Design and Additio...	Test
DCN-000002	Open	Test 02	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	03/13/2024 05:33 AM	Notification of New Dra...	test
DCN-000001	Notify_Acknowledged	Test 01	Baluvuri Kumar- Project ...	Baluvuri Kumar- Project ...	03/13/2024 03:18 AM	Design Changed Due to ...	test



3. In the **General** block of the upper form, complete all mandatory and relevant optional fields.

Title	The Title field is limited to 50 characters or less and should provide a concise, descriptive name for the DCN record. Choose a title that quickly conveys the main subject of the design change. This helps other users easily identify the contents of the notice at a glance.
Due Date	The Due Date is automatically set to 30 days after the record creation date. However, you can adjust this date as needed to reflect the actual deadline for completing the DCN process. Ensure the Due Date aligns with project timelines and expectations.

Create New Design Change Notices Save Draft More Actions

Design Change Notice Document Details P6 Activity Details

▼ **General**

Record No

Status

Title *

Due Date Required

Creator

Project Manager

Originator ⓘ ✕

Creation Date

Record Last Update Date

4. In the **Overview** block of the upper form, complete all mandatory and relevant optional fields.

Reason Code	Select the appropriate reason for initiating the design change notice from the drop-down menu. This helps categorize the change and provides context for why it's being made. Note: If you select "Other" as the reason, an additional field will appear where you must specify the reason for the change. This ensures that all design changes are properly documented and justified.
If Other Reason Code	If "Other" has been selected as the Reason Code, this field becomes mandatory. Enter a brief and specific reason for the design change. This ensures that the purpose of the change is clearly documented and understood by all stakeholders.
Description	Use this field to provide a detailed explanation of the design change. Clearly outline the scope, reasons, and any important details that stakeholders need to understand. While the field allows up to 4000 characters, focus on including all relevant information to ensure the change is well-documented and easy to comprehend by anyone reviewing the DCN.

Design Change Notice Document Details P6 Activity Details

▼ **Overview**

Reason Code *

Issued To ⓘ ✕

If Other Reason Code *

Description *

Enter 4000 or fewer characters.



5. Navigate to the **Document Details** tab and click **ADD** to include a new line item.

About Document Details

The Document Details Line Item block captures specific information about the documents and files associated with the Design Change Notice (DCN). This section is essential for tracking the supporting documentation that relates to the design change, such as revised drawings, technical specifications, or other materials impacted by the change. It allows users to attach relevant files, provide document identifiers, and specify which departments or disciplines are affected by the design modification. This block ensures that all necessary documentation is organized and easily accessible for stakeholders who need to review the design changes, enhancing clarity and accountability throughout the process.

6. In the **Line-Item Details** section of the **Document Details** tab, complete all mandatory and relevant optional fields.

Name	Attach the document that is associated with the design change. Once attached, the document's name will automatically populate this field. Ensure that the document you select is relevant and clearly labeled to reflect its contents.
Title	Provide a clear and concise title for this line item. The title should accurately describe the document or item, making it easy for others to identify and understand its relevance to the design change.

7. Once all mandatory & optional fields of the **Document Details** line-item details, click **Save**.

- Save:** Click this button to save the details you've entered for the current line item. This ensures your changes are stored and the information is securely recorded.
- Save & Add New:** Click this button to save the current line item's details and immediately open a new blank line item form. This option is useful for quickly adding multiple items in succession without needing to exit the form.



8. Navigate to the **P6 Activity Details** tab and click ADD to include a new line item.

About P6 Activity Details

The P6 Activity Details Line Item block allows users to track how the design change impacts the project schedule by linking it to specific P6 activities. This section is essential for managing project timelines, as it helps identify which tasks or activities may need adjustments due to the design change. Users can record the planned start and finish dates for impacted activities, link them to relevant P6 activity IDs, and document any comments related to how the changes affect the project's schedule. This block provides a clear connection between the design change and the project's overall timeline, ensuring that any adjustments to activities are accounted for and tracked in both the design and project management systems.

9. In the **Line-Item Details** section of the **P6 Activity Details** tab, complete all mandatory and relevant optional fields.

P6 Activity	Select the relevant P6 Activity ID from the list. This ID links the design change to a specific task or activity within the P6 project schedule. Make sure to choose the correct activity ID to ensure that the impact of the design change is accurately tracked within the project timeline.
Comments	Use this field to add any additional information or notes related to the selected P6 activity. This is an opportunity to provide context, clarify details, or highlight any specific considerations that should be considered regarding the impact of the design change on the activity.

10. Once all mandatory & optional fields of the **Document Details** line-item details, click **Save**.

- Save:** Click this button to save the details you've entered for the current line item. This ensures your changes are stored and the information is securely recorded.
- Save & Add New:** Click this button to save the current line item's details and immediately open a new blank line item form. This option is useful for quickly adding multiple items in succession without needing to exit the form.

11. Once all mandatory and relevant optional fields are complete, click **Send** at the top right of the form.

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

Create New Design Change Notices

Save Draft

More Actions

Send



12. Verify **Submit Change Notice** as the workflow action and **Acknowledge Notification** as the auto-populated entry in the **Send For** field.

The screenshot shows the 'Create New Design Change Notice' form. The 'General' tab is active, displaying fields for Record No, Title (with a red asterisk), Due Date, and Creator. The 'Title' field contains 'Training' and the 'Due Date' is '08/05/2024 12:56 AM'. The 'Creator' is 'Baluvuri Kumar - Project Engineer'. A modal window titled 'Workflow Action Details' is open, showing 'Action Details' and 'Due Date Details'. In the 'Action Details' section, 'Workflow Actions' is set to 'Submit Change Notice' and 'Send For' is set to 'Acknowledge Notification'. The 'To' and 'CC' fields are empty, with placeholder text 'Start typing for suggestions...'. The 'Due Date Details' section shows 'Task Due Date'.

13. 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.
14. Click **Send**.



2.2 Acknowledge Notification of a Design Change Notice

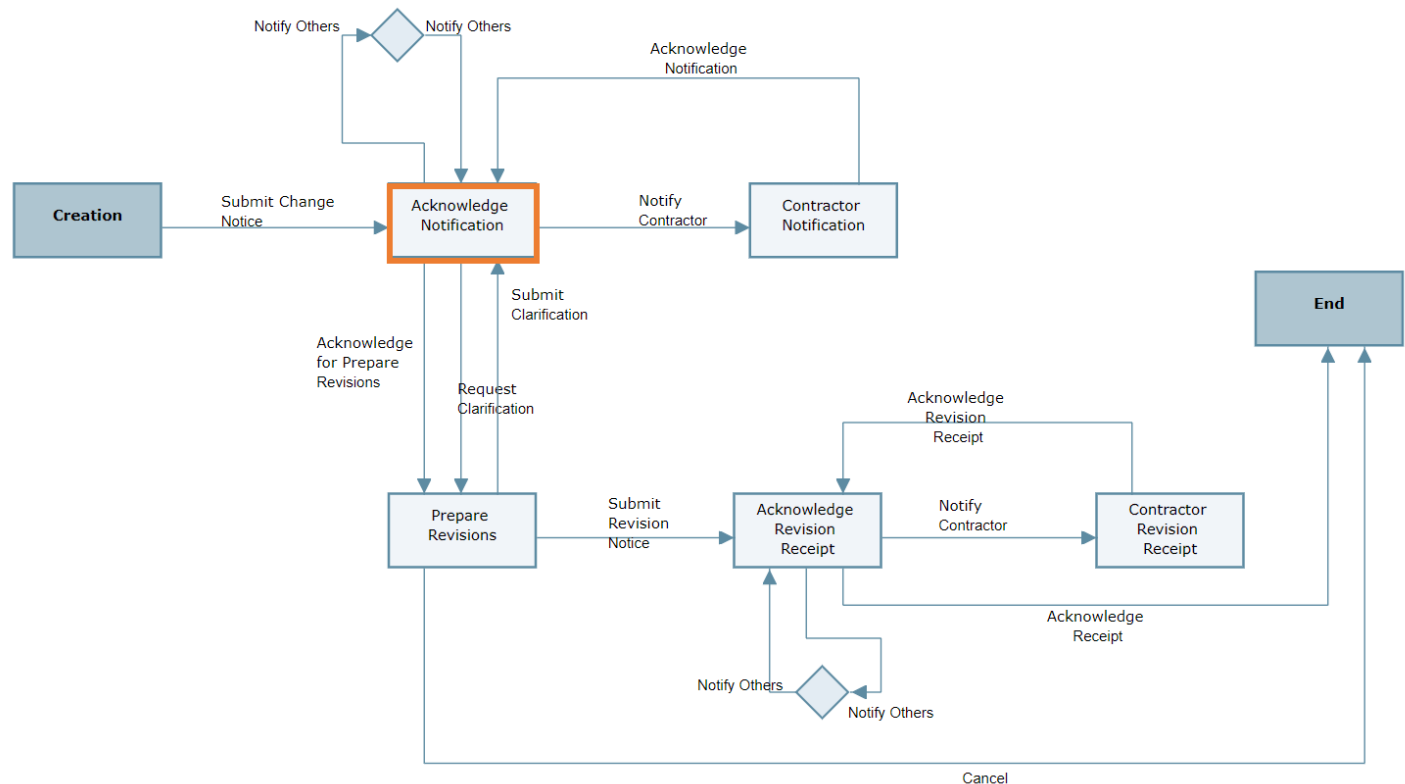
User Roles

Project Engineers, Project Managers, Track Leads (Coordinator)

Workflow Step Summary

The Coordinators are notified about the DCN and must acknowledge receipt. They then choose one of the following actions:

- Notify the Contractor,
- Request further clarification from the Initiator, or
- Acknowledge the notice and send the record back to the Initiator for design revisions.



Business Process Flow

1. In the left Navigator, click **Change Management > Design Change Notice**.
2. Double-click the Design Change Notice record to be acknowledged.

Tasks	Tasks						
Notifications	+ Create Actions View: All Tasks						
Drafts							
Shell Access Request							
Origin	Business Process	Record Number	Title	Record Due	From	Sent for	
Project_Demo_TSS	Design Change No...	DCN-000018	Training	08/05/2024 12:56 ...	Baluvuri Kumar- Pr...	Acknowledge Noti...	
Project_Demo_TSS	Gate Review	GR-00026	test	07/01/2024 10:24 ...	Rashmi Singh-Proj...	Review Request	



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

4. In the **Overview** section of the **Design Change Notice** window, review and update the required field **Reason Code**.

5. To create any of the following records from the DCN record, navigate to the respective tab and click **+Create**. This is not a required action. However, if the user perceives that an IDR or Correspondence needs to be generated in association with the DCN, this provision can be used to create IDR or Correspondence records directly from the DCN form. Refer to the creation step in the user guides of the mentioned business processes for guidance on actions to be taken after clicking +Create.
- a. **Internal Document Reviews:** The Internal Document Reviews (IDR) is a simple form and workflow utilized to request the review and approval of documents that were created outside of Unifier and brought in as attachments. (Refer to the Internal Document Reviews User Guide)
 - b. **Correspondence:** A correspondence record can be created for formal correspondence from the Contractor to the Southern Company or from the Southern Company to the Contractor. (Refer to the Correspondence User Guide)
 - i. Note: User to ensure that the created correspondence record is closed before submitting for “Acknowledge Revision Receipt.”



6. Once all mandatory and optional fields for the **Design Change Notice** record are populated, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - You can also click **Save Draft** to revisit later.

Design Change Notices

Save Draft

More Actions

Send

7. Select the **Workflow Action**:

- Acknowledge for Prepare Revisions:** Select this workflow action if you find the submitted Design Change Notice record acceptable. This action sends the record back to the Initiator for preparing the revised design.
- Request Clarification:** Select this workflow action to request clarification regarding details of the Design Change Notice Record from the Initiator.
- Notify Others:** Select this workflow action to keep the record in the **Acknowledge Notification** step, while reassigning the record to another member of the Coordinators group for the Acknowledge Notification step.
- Notify Contractor:** Select this workflow action to send the Design Change Notice to a Contractor to notify them of the same.

8. Based on the option selected under **Workflow Action**, the following is the status of the **To** and **Send For** fields.

Workflow Action	To	Send For
Acknowledge for Prepare Revisions	Initiator	Prepare Revisions
Request Clarification	Request Clarifications	Prepare Revisions
Notify Others	Manually Enter Recipient	Acknowledge Notification
Notify Contractor	Manually Enter Recipient (Partner Engineer/ Partner Contractor)	Contractor Notification

9. Click **Send**.



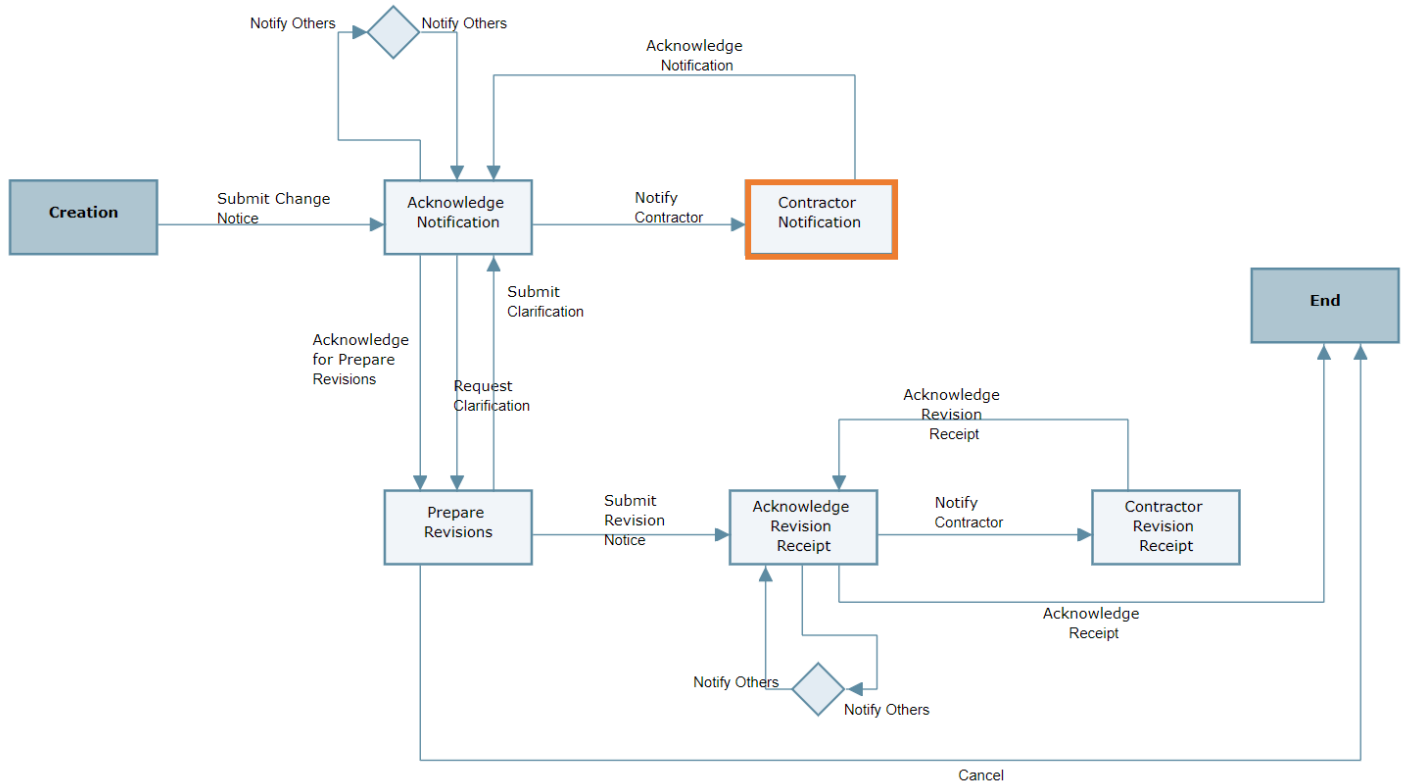
2.3 Contractor Acknowledges Notification of a Design Change Notice

User Roles

Partner Contractors, Partner Engineers (Contractor)

Workflow Step Summary

The Contractor is informed that a design change notice has been issued. They review the notice, acknowledge it, and then return the acknowledgment to the Coordinators for further processing.



Business Process Flow

1. In the left Navigator, click **Change Management > Design Change Notice**.
2. Double-click the Design Change Notice record to be acknowledged.

The screenshot shows a 'Tasks' sidebar on the left with 'Tasks' selected. The main area displays a table of tasks. The first row is highlighted with an orange border.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
Project_Demo_TSS	Design Change No...	DCN-000018	Training	08/05/2024 12:56 ...	Rashmi Singh-Proj...	Contractor Notific...	

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

The screenshot shows the 'Design Change Notices' form. The 'Task Details' section is expanded, showing the 'From' field with the value 'Rashmi Singh-Project Manager' and the 'To' field with the value 'Hariharanath Maganti- Partner Contractor'. The 'Sent For' field is set to 'Contractor Notification'. The 'General' section is also expanded, showing the 'Record No' field with the value 'DCN-000018' and the 'Status' field with the value 'Open'. In the top right corner, there are buttons for 'Decline', 'More Actions', and 'Accept'.



4. To create any of the following records from the DCN record, navigate to the respective tab and click **+Create**. This is not a required action. However, if the user perceives that an IDR or Submittals needs to be generated in association with the DCN, this provision can be used to create IDR or Submittals records directly from the DCN form. Refer to the creation step in the user guides of the mentioned business processes for guidance on actions to be taken after clicking +Create.
 - a. **Internal Document Reviews:** The Internal Document Reviews (IDR) is a simple form and workflow utilized to request the review and approval of documents that were created outside of Unifier and brought in as attachments. (Refer to the Internal Document Reviews User Guide).
 - b. **Submittals:** Submittals provide the ability for Partner Users (Contractors or Vendors) to submit contract-related (Project-related or asset-related) documents to Southern Company for “information only” and/or “review and approval” (Refer to the Submittals User Guide).

Design Change Notices

Design Change Notice | Document Details | P6 Activity Details | **Correspondence** | Submittals

General

Record No: DCN-000018 | Status: Open

Title: Training

Due Date: 08/05/2024 12:56 AM | Originator: Baluvuri Kumar- Project Engineer

5. Once all mandatory and optional fields for the **Design Change Notice** record are reviewed and updated, 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.

Design Change Notices

Save Draft | **More Actions** | **Send**

6. Select the Workflow Action:
 - a. **Acknowledge Notification:** Verify Acknowledge Notification as the default workflow action and the default entry in the **Send For** field is also Acknowledge Notification.

Workflow Action Details

Action Details

Workflow Actions: Acknowledge Notification | Send For: Acknowledge Notification

To: Start typing for suggestions...

CC: Start typing for suggestions...

Due Date Details

Task Due Date

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 review.
8. Click **Send**.



4. In the **General** section of the **Create Design Change Notice** form, review, and edit if required the text in the required field **Title** and **Due Date**.
 - a. The **Title** is limited to 50 characters or less.

Design Change Notice Document Details P6 Activity Details

General

Record No

Title *

Due Date Required

08/05/2024 12:56 AM

Creator

Baluvuri Kumar- Project Engineer

Project Manager

Company Administrator

Status

Originator

Baluvuri Kumar- Project Engineer

Creation Date

Record Last Update Date

5. In the **Overview** section, review and edit if required the following required fields.
 - b. **Reason Code**: Select from the drop-down menu the reason for initiating the design change notice.

Overview

Reason Code *

Select

Issued To

Type a Name...

If Other Reason Code

6. In the **Description** section review and edit the **Description** field if required.

Description *

Training

Enter 4000 or fewer characters.

7. Navigate to the **Document Details** tab and select **Add > Line Item** to add a new line item or double-click an existing line item to edit it.

Create New Design Change Notices

Design Change Notice Document Details P6 Activity Details

Add Actions View Comments by: All

Folder

Line Item

File ID	Title	Discipline/Departm... Impacted	Document #	Revision #	Rev



8. In the Line Item Details form, review and complete the following required fields.

c. **Name:** Attach the required document associated with the design change. The name of the attached document will be populated in the Name field.

d. **Title:** Enter the required title for the line item.

9. Complete all mandatory & optional fields of the **Document Details** line-item details.

e. **Save:** The document details line item is saved

f. **Save & Add New:** The document details line item is saved and a new line item is added.

10. To create any of the following records from the DCN record, navigate to the respective tab and click **+Create**. This is not a mandatory step. However, if the user perceives that an IDR, Submittal or Correspondence needs to be generated in association with the DCN, this provision can be used to create IDR, Submittal or Correspondence records directly from the DCN form. Refer to the creation step in the user guides of the mentioned business processes for guidance on actions to be taken after clicking +Create.

g. **Internal Document Reviews:** The Internal Document Reviews (IDR) is a simple form and workflow utilized to request the review and approval of documents that were created outside of Unifier and brought in as attachments. (Refer to the Internal Document Reviews User Guide)

h. **Correspondence:** A correspondence record can be created for formal correspondence from the Contractor to the Southern Company or from the Southern Company to the Contractor. (Refer to the Correspondence User Guide)

i. Note: User to ensure that the created correspondence record is closed before submitting for "Acknowledge Revision Receipt."

i. **Submittals:** Submittals provide the ability for Partner Users (Contractors or Vendors) to submit contract-related (Project-related or asset-related) documents to Southern Company for "information only" and/or "review and approval" (Refer to the Submittals User Guide)

To edit existing records of the above three business processes, navigate to the relevant tab and double-click the record to be edited.



11. Once all mandatory and optional fields for the **Design Change Notice** are complete, click **Send** at the top right of the form.
- j. The **Workflow Actions Details** pop-up window will display.
 - k. You can also click **Save Draft** to revisit later.

12. Select the workflow action from the dropdown menu in the **Workflow Actions** field.

- l. **Cancel:** Select this workflow action to cancel the design change notice record and send it to Terminal End. There shall be no design change associated with this record and the record cannot be edited after this action.
 - m. **Submit Revision Notice:** Select this workflow action if the Coordinators have acknowledged the record for preparing revisions. The record will be routed to the Coordinators to acknowledge the prepared design revisions.
 - n. **Submit Clarification:** Select this workflow action if the Coordinators have requested clarification. This action will route the record back to the Coordinators for the Acknowledge Notification workflow step.
13. 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. Based on the option selected in the **Reviewer Action** field, the following entries are auto-assigned in the **To** and **Send For** fields:

Reviewer Action	To	Send For
Cancel	To field not available	End
Submit Revision Notice	Type Manually (Coordinators Group)	Acknowledge Revision Notice
Submit Clarification	Type Manually (Coordinators Group)	Acknowledge Notification

14. Click **Send**.



4. Review the form.
5. To the right of the form, navigate to the comments tab. Provide comments as necessary and click **Post**.

The screenshot shows the 'Design Change Notice' form. The 'General' tab is selected, displaying fields for Record No (DCN-000018), Status (Notify_Acknowledged), Title (Training), Due Date (08/05/2024 12:56 AM), and Originator (Baluvuri Kumar- Project Engineer). To the right, the 'Comments' tab is active, showing a text area for comments and buttons for 'Clear' and 'Post'.

6. To create any of the following records from the DCN record, navigate to the respective tab and click **+Create**. This is not a required action. However, if the user perceives that an IDR or Correspondence needs to be generated in association with the DCN, this provision can be used to create IDR or Correspondence records directly from the DCN form. Refer to the creation step in the user guides of the mentioned business processes for guidance on actions to be taken after clicking +Create.
 - a. **Internal Document Reviews:** The Internal Document Reviews (IDR) is a simple form and workflow utilized to request the review and approval of documents that were created outside of Unifier and brought in as attachments. (Refer to the Internal Document Reviews User Guide)
 - b. **Correspondence:** A correspondence record can be created for formal correspondence from the Contractor to the Southern Company or from the Southern Company to the Contractor. (Refer to the Correspondence User Guide)
 - i. Note: User to ensure that the created correspondence record is closed before submitting for "Acknowledge Revision Receipt."

The screenshot shows the 'Design Change Notices' form. The 'General' tab is selected, displaying fields for Record No (DCN-000018), Status (Open), Title (Training), Due Date (08/05/2024 12:56 AM), and Originator (Baluvuri Kumar- Project Engineer). To the right, the 'Internal Document Reviews' tab is active, showing a text area for comments and buttons for 'Clear' and 'Post'.

7. Once all mandatory and optional fields for the **Design Change Notice** record are reviewed and updated, click **Send** at the top right of the form.
8. The **Workflow Actions Details** pop-up will appear.
9. 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.

The screenshot shows the bottom right corner of the 'Design Change Notices' form. It includes buttons for 'Save Draft', 'More Actions', and 'Send'.

- 10.** Select the Workflow Action:
- Notify Contractor:** Select this workflow action to send the record to the Contractor to view and acknowledge the changed design.
 - Acknowledge Receipt:** Select this action to Acknowledge the receipt of the Changed Design and send the record to **End**.
 - Notify Others:** Select this workflow action to send the record to others in the Coordinator group to view and acknowledge the changed design. The record will remain in the **Acknowledge Revision Receipt** step.

- 11.** Based on the option selected under **Workflow Action**, the following is the status of the **To** and **Send For** fields.

Workflow Action	To	Send For
Acknowledge Receipt	-	End
Notify Others	Manually Enter Recipient	Acknowledge Revision Receipt
Notify Contractor	Manually Enter Recipient (Partner Engineer/ Partner Contractor)	Contractor Revision Receipt

- 12.** Click **Send**.

User Roles

Workflow Step Summary

```

graph LR
    Creation[Creation] -- "Submit Change Notice" --> AN[Acknowledge Notification]
    AN -- "Notify Others" --> NO1{ }
    NO1 --> AN
    AN -- "Notify Contractor" --> CN[Contractor Notification]
    CN -- "Acknowledge Notification" --> AN
    AN -- "Acknowledge for Prepare Revisions" --> PR[Prepare Revisions]
    PR -- "Request Clarification" --> AN
    PR -- "Submit Clarification" --> AN
    PR -- "Submit Revision Notice" --> AR[Acknowledge Revision Receipt]
    AR -- "Acknowledge Revision Receipt" --> CNR[Contractor Revision Receipt]
    CNR -- "Notify Contractor" --> AR
    AR -- "Notify Others" --> NO2{ }
    NO2 -- "Notify Others" --> AR
    PR -- "Cancel" --> End[End]
    AR -- "Acknowledge Receipt" --> End
  
```

The flowchart illustrates the Change Management Process, starting with 'Creation' and ending with 'End'. The process involves several key steps and decision points:

- Creation** leads to **Acknowledge Notification** via the **Submit Change Notice** event.
- Acknowledge Notification** has a feedback loop labeled **Notify Others** that returns to the **Acknowledge Notification** step.
- Acknowledge Notification** leads to **Contractor Notification** via the **Notify Contractor** event.
- Contractor Notification** leads back to **Acknowledge Notification** via the **Acknowledge Notification** event.
- Acknowledge Notification** leads to **Prepare Revisions** via the **Acknowledge for Prepare Revisions** event.
- Prepare Revisions** has a feedback loop labeled **Request Clarification** that returns to the **Acknowledge Notification** step.
- Prepare Revisions** has a feedback loop labeled **Submit Clarification** that returns to the **Acknowledge Notification** step.
- Prepare Revisions** leads to **Acknowledge Revision Receipt** via the **Submit Revision Notice** event.
- Acknowledge Revision Receipt** leads to **Contractor Revision Receipt** via the **Acknowledge Revision Receipt** event.
- Contractor Revision Receipt** leads back to **Acknowledge Revision Receipt** via the **Notify Contractor** event.
- Acknowledge Revision Receipt** has a feedback loop labeled **Notify Others** that returns to the **Acknowledge Revision Receipt** step.
- Prepare Revisions** leads to **End** via the **Cancel** event.
- Acknowledge Revision Receipt** leads to **End** via the **Acknowledge Receipt** event.

1. Click the Tasks option in the **Navigator**.
2. Double-click on the record to be approved.

3. The Design Change Notice form opens. In the top right corner of the window, click **Accept**.

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4. Review the form.
5. To create any of the following records from the DCN record, navigate to the respective tab and click **+Create**. This is not a mandatory step. However, if the user perceives that a Submittal or Correspondence needs to be generated in association with the DCN, this provision can be used to create Submittal or Correspondence records directly from the DCN form. Refer to the creation step in the user guides of the mentioned business processes for guidance on actions to be taken after clicking +Create.
 - a. **Correspondence:** A correspondence record can be created for formal correspondence from the Contractor to Southern Company or from Southern Company to the Contractor (Refer to the Correspondence User Guide).
 - i. Note: User to ensure that the created correspondence record is closed before submitting for “Acknowledge Revision Receipt”.
 - b. **Submittals:** Submittals provide the ability for Partner Users (Contractors or Vendors) to submit contract-related (Project-related or asset-related) documents to Southern Company for “information only” and/or “review and approval” (Refer to the Submittals User Guide).

The screenshot shows the 'Design Change Notices' form with the 'Correspondence' tab selected. The form includes a 'General' section with the following fields:

Record No	Status
DCN-000018	Open

Title
Training

Due Date	Originator
08/05/2024 12:56 AM	Baluvuri Kumar- Project Engineer

6. Once all mandatory and optional fields for the **Design Change Notice** record are reviewed and updated, click **Send** at the top right of the form.
7. 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. Verify **Acknowledge Revision Receipt** as the workflow action and the send for field is Auto populated with **Acknowledge Revision Receipt**.

The screenshot shows the 'Workflow Action Details' pop-up window. It includes the following sections:

- Action Details**
 - Workflow Actions: Acknowledge Revision Receipt
 - Send For: Acknowledge Revision Receipt
 - To: Start typing for suggestions...
 - CC: Start typing for suggestions...
- Due Date Details**
 - Task Due Date



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.
10. Click **Send**.

2.7 Related Business Processes

The Design Change Notice business process is related to other business processes within Unifier.

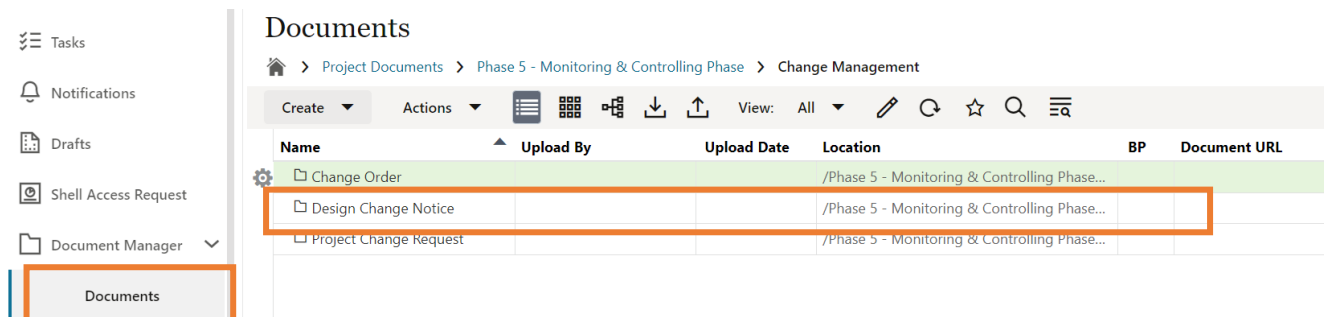
Workflow Step	Summary
Correspondence	The Correspondence BP is often used for formal communication between project stakeholders. A user may choose to create a Correspondence record to initiate discussions or to highlight changes in design. This correspondence can then be referenced in the DCN, ensuring that the communication trail is maintained and that all changes are acknowledged before proceeding further.
Submittals	Submittals are used to formally submit design information or materials for approval. If there is a need to revise a design prior to the DCN submission, a user might create a Submittal. This submittal can be linked to the DCN through the Submittals Query tab, confirming that the necessary approvals or modifications have been addressed before proceeding with the design change notice.
Internal Document Reviews	Before submitting a DCN for acknowledgment, a user might create an IDR to review the design changes internally. The IDR ensures that internal teams, such as engineers, review the design modifications. Once the IDR process is complete, the user can link the IDR to the DCN using the IDR Query tab, ensuring that the reviewed design is properly documented and referenced.
Request for Information	An RFI is typically used to request clarification or additional information on certain aspects of a project. After resolving an RFI, a user may determine that a design change is necessary. The resolved RFI can be referenced in the DCN BP to ensure that the design change is tracked back to the original query, maintaining a clear link between the information request and the subsequent design modification.
Project Change Request	A PCR is used to formally request a change to the project scope, budget, or schedule. If a design change is approved as part of a PCR, the user can link the PCR to the DCN, ensuring that the design change is documented as part of the broader project change process.
Issues	The Issues BP is used to track problems or challenges that arise during a project. If an issue results in a required design change, the user can create a DCN and link it to the Issues BP. This linkage ensures that the design change is directly connected to the issue that prompted it, allowing for better tracking and resolution of project challenges.



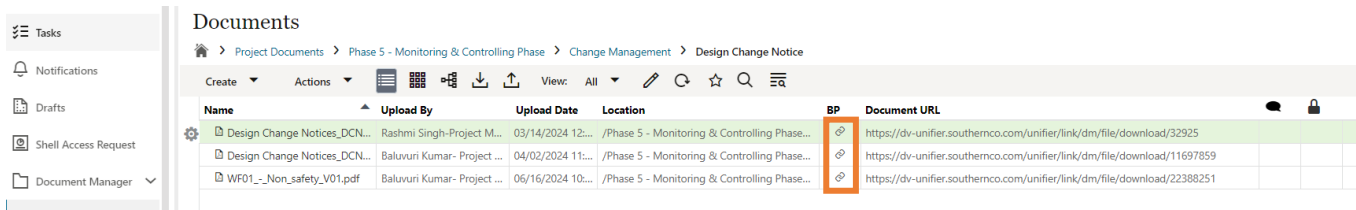
2.8 Design Change Notice BP & Document Manager

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.

1. In the left **Navigator**, click **Document Manager**.
2. Click **Documents**.
3. In the central pane, navigate to the following folder:
 - a. **Phase 5 - Monitoring & Controlling Phase > Design Change Notice**



4. 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.
5. 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.



6. 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).



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.

Acknowledgement	A confirmation from stakeholders that they have received and understood the DCN. Acknowledgments are necessary before the DCN can proceed to the next step in the workflow.
Coordinator	The person who manages the DCN after it has been initiated. The Coordinator is responsible for notifying stakeholders, ensuring acknowledgments are received, and routing the DCN through its workflow.
Terminal End	The final stage in the DCN workflow where the record is considered complete, non-editable, and automatically archived in the Document Manager.

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
DCN	Design Change Notice
IDR	Internal Document Review
PCR	Project Change Request



4.4 Frequently Asked Questions

1. Why can't I see the linked records in the DCN?

Ensure that the linked records were correctly selected and that you have access to view those related business processes (e.g., Correspondence, IDR, Submittals). Also, check if the necessary queries are enabled in the DCN form.

2. Why isn't the DCN being published to the Document Manager?

Confirm that the DCN has reached its terminal end and that the post-processing steps have been correctly completed. If the issue persists, there may be a configuration error in the publishing path, which will require admin intervention.

3. Why isn't the DCN being routed to the next user?

Confirm that all required fields are filled out correctly and that the previous user has properly acknowledged the DCN.

4. Why can't I add a comment to the DCN?

Verify that the DCN is still in an editable state and not yet in the post-processing phase. If the DCN has already been routed to the terminal end, it will no longer be editable, and comments cannot be added.

5. How do I know if my DCN has been acknowledged?

You can track the status of your DCN in the workflow tab within the DCN record. The system will show whether the DCN has been acknowledged by the required parties and what the next steps are.

6. How do I access a DCN that has been completed?

Completed DCNs can be accessed through the project shell under the DCN business process. You can search for specific DCNs using filters or review them directly from the Document Manager where they are archived.

7. What do I do if I need to revise a DCN after it's been submitted?

If revisions are needed, you can prepare and submit the revisions through the DCN process. The revised DCN will be routed through the same workflow for acknowledgment by the necessary stakeholders.

8. Who reviews the DCN after I submit it?

After submission, the DCN is reviewed by a Coordinator who ensures that all necessary parties are notified and that they acknowledge the change. The Coordinator manages the workflow, ensuring the DCN is processed correctly.