
NONCONFORMANCE REPORT (NCR)

Oracle Unifier Business Process User Guide



Table of Contents

1. Business Process Overview.....	2
1.1 Understanding the Nonconformance Report.....	2
1.2 User Groups & Permissions.....	2
1.3 Business Process Flow	3
1.3.1 Non-Safety Workflow.....	3
1.3.2 Safety Workflow.....	4
1.4 Nonconformance Report Form Explained.....	5
2. Step-by-Step Instructions.....	7
Non-Safety Workflow	7
2.1 Create a Nonconformance Report Record – Non-Safety.....	7
2.2 Recommendation of Nonconformance Report Record – Non-Safety	11
2.3 Revision of Nonconformance Report Record- Non-Safety	14
2.4 Technical Review of Nonconformance Report Record-Non-Safety.....	16
2.5 Site Team Review of Nonconformance Report Record - Non-Safety.....	18
2.6 Implementation of Nonconformance Report Record – Non-Safety.....	20
2.7 Verification of Nonconformance Report Record-Non-Safety.....	23
2.8 Final Review of Nonconformance Report Record – Non-Safety.....	26
Safety Workflow.....	29
2.9 Create a Nonconformance Report Record – Safety	29
2.10 Recommendation of Nonconformance Report Record - Safety.....	33
2.11 Revision of Nonconformance Report Record- Safety	35
2.12 Resubmit for Recommendation of Nonconformance Report Record - Safety	37
2.13 Implementation of Nonconformance Report Record - Safety	39
2.14 Final Review of Nonconformance Report Record - Safety	42
2.15 Related Business Processes	46
2.16 BP & Document Manager	46
2.16.1 Non-Safety.....	46
2.16.2 Safety	48
3. Business Unit Guidance	50
4. Appendix	50
4.1 Getting Help & Support	50
4.2 Glossary of Terms	50
4.3 Abbreviations and Acronyms.....	50
4.4 Frequently Asked Questions	51



1. Business Process Overview

Shell Level	Project Level
Workflow	Yes
Connected BPs	Purchase Order Issues Risks
Partner Access	No

1.1 Understanding the Nonconformance Report

The Nonconformance Report (NCR) Business Process in Oracle Unifier is a structured procedure used to document, manage, and resolve instances where project activities or items fail to meet established standards, specifications, or quality requirements. It is a critical tool in project management and quality control, ensuring that any deviations from expected practices are properly recorded, assessed, and corrected. Below are a few benefits.

- **Documentation of Deviations:** The NCR BP provides a formal mechanism to document nonconformances, ensuring that all deviations are logged in a consistent and standardized manner. This is important for maintaining accurate records of issues encountered during a project.
- **Quality Assurance:** By capturing nonconformances, the NCR BP helps maintain quality standards across projects. It ensures that all noncompliant items or activities are identified, reviewed, and addressed to prevent recurrence.
- **Compliance and Safety:** The process supports compliance with regulatory and safety standards, especially through its dedicated safety nonconformance workflow. This is essential for industries where safety is a critical concern.

The process includes two distinct workflows to address **Safety** and **Non-Safety** nonconformances.

1.2 User Groups & Permissions

All Project Users	Users can Create and implement an NCR record.
Partner Contractors	Users can Create and implement an NCR record.
Partner Engineers	Users can Create, perform technical reviews, and implement an NCR record.
Construction Managers	Users can recommend and verify an NCR record.
Construction Team	Users can recommend, perform site team reviews, and verify for an NCR record.
Construction Quality	Users can recommend, perform technical reviews & site team reviews, and verify for an NCR record.
Project Managers	Users can verify an NCR record.
Project Engineers	Users can perform technical reviews for an NCR record.

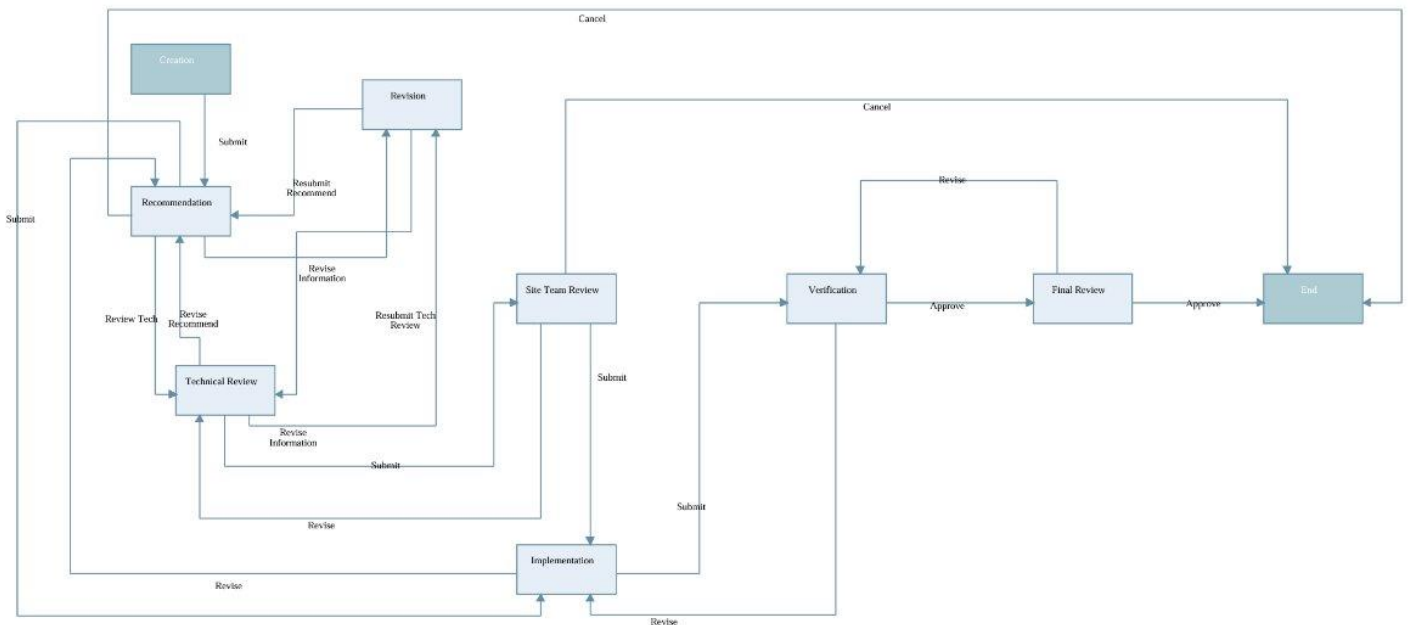


1.3 Business Process Flow

Non – Safety Workflow: The Non-Safety Non-Conformance Workflow focuses on identifying, documenting, and addressing deviations from established quality standards, specifications, or procedures that do not directly impact safety. This workflow ensures that products, services, or processes meet the required quality standards and specifications, maintaining overall project integrity and customer satisfaction.

Safety Workflow: The Safety Non-Conformance Workflow is designed to identify, document, and address issues that pose a direct threat to the safety of personnel, equipment, or the environment. This workflow ensures that any safety-related non-conformance is promptly and effectively managed to prevent accidents, injuries, or environmental harm.

1.3.1 Non-Safety Workflow

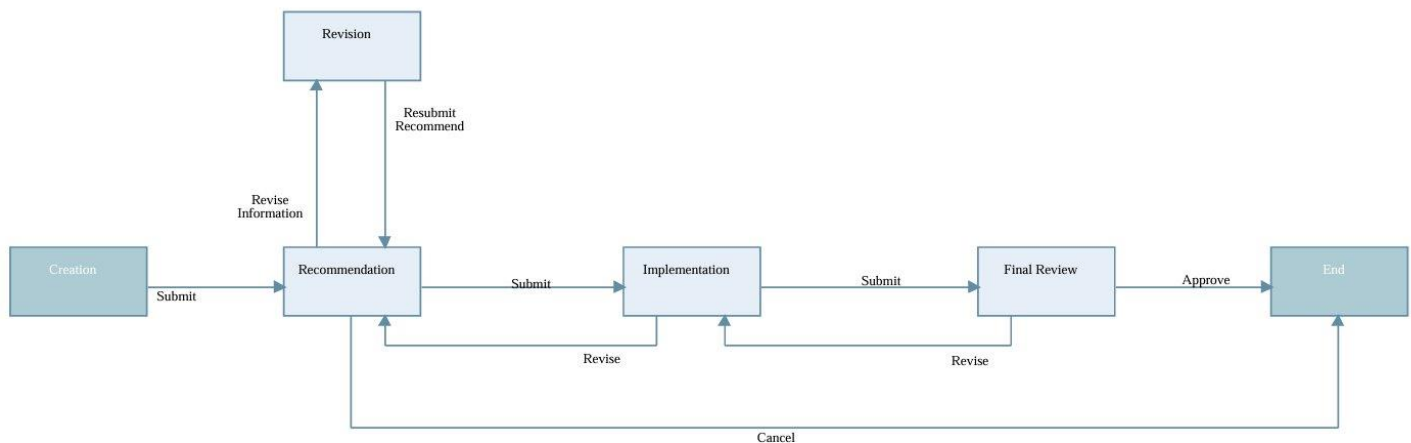


Workflow Step	Summary
Creation	The user creates the Nonconformance form and sends the form for recommendation
Recommendation	The user evaluates and recommends how to address the non-conformance.
Revision	The user reviews the record to ensure it is valid and all relevant information is attached. The user identifies missing or unclear information and therefore requests the creator to revise the information
Technical Review	The user reviews the record fills the technical review section and then decides on how to proceed with the record: Revise-Recommend, Submit, or Revise-Information.
Site Team Review	The user reviews the record and decides on how to proceed with the record: Submit, Cancel. The user is not able to edit the record. The user can only provide comments via the Standard Comments tab.
Implementation	The user implements actions to resolve the nonconformance and then decides on how to proceed with the record: Submit, Revise.
Verification	The user reviews the record fills in the verification section and then decides on how to proceed.
Final Review	The user reviews the record and decides on how to proceed with the record: Approve, Revise.

**End**

The record reaches the terminal end, the record is Approved. PDF version is auto published to the document manager.

1.3.2 Safety Workflow



Workflow Step	Summary
Creation	The user creates the Nonconformance form and sends the form for recommendation.
Recommendation	The user reviews the record and decides how to proceed with the record: Revise Information, Submit, or Cancel.
Revision	The user updates the record per the approver's feedback and resubmits the record.
Implementation	The user implements actions to resolve the nonconformance and then decides on how to proceed with the record: Submit, Revise.
Final Review	The user reviews the record and decides on how to proceed with the record: Approve, Revise.
End	The record reaches the terminal end, the record is approved. PDF version is auto published to the document manager.



1.4 Nonconformance Report 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 Nonconformance Report form. It is divided into several blocks, each containing specific fields. The form is titled "Nonconformance Report" and includes tabs for "Nonconformance Report", "Document Details", "Issues", and "Risks".

Line Item Details: This label points to the "Nonconformance Report" tab.

Form Fields: This label points to the input fields within the "Nonconformance Details" block, specifically the "Description" and "Technical Document Reference" fields.

Form Blocks: This label points to the overall structure of the form, which is divided into several sections:

- General:** Contains fields for "Nonconformance Report", "Document Details", "Issues", and "Risks".
- Nonconformance Details:** Contains fields for "Description" and "Technical Document Reference".
- Recommendation:** Contains a field for "Recommendation Explanation".
- Technical Review:** Contains a field for "Clarification".
- Implementation:** Contains a field for "Resolution".
- Verification:** Contains a field for "Verification Comments".
- Record Information:** Contains a field for "Issue Reported by this NCR".

1.4.1 Upper Form

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.
- **Non Conformance Details:** This block dives into the specifics of the nonconformance incident itself. This section captures the crucial details about what went wrong, including the parties involved and the departments impacted. It serves to document the key facts about the nonconformance, making it easier to understand the nature and scope of the issue.
- **Recommendation:** This block focuses on the proposed solutions or corrective actions for the nonconformance. It allows the responsible parties to suggest how the issue should be resolved, including whether technical approval is required. This section is about laying out a plan of action to address the nonconformance and prevent it from recurring.
- **Technical Review:** This block is where the proposed recommendations are scrutinized by technical experts. It's designed to capture feedback, clarifications, and any required revisions to the proposed solutions. This ensures that the recommended actions are feasible and technically sound before implementation.
- **Implementation:** This block is where the corrective actions are documented as they are carried out. It records when and how the solutions were put into practice, ensuring that the resolution is executed according to the plan. This block tracks the follow-through on the recommendations to ensure that the nonconformance is addressed effectively.
- **Verification:** This block is the final checkpoint to confirm that the nonconformance has been resolved and that the corrective actions were successful. It captures the final review and any necessary adjustments or repairs, ensuring that the issue has been fully addressed and verified. This section closes the loop on the nonconformance by validating that the problem is resolved.



- **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):** This block captures the specifics of each document or item related to the nonconformance. It includes key identifiers and descriptions, ensuring that all relevant documents are accurately recorded and linked to the NCR. This helps in maintaining a clear audit trail and facilitates easy reference for further actions or reviews.



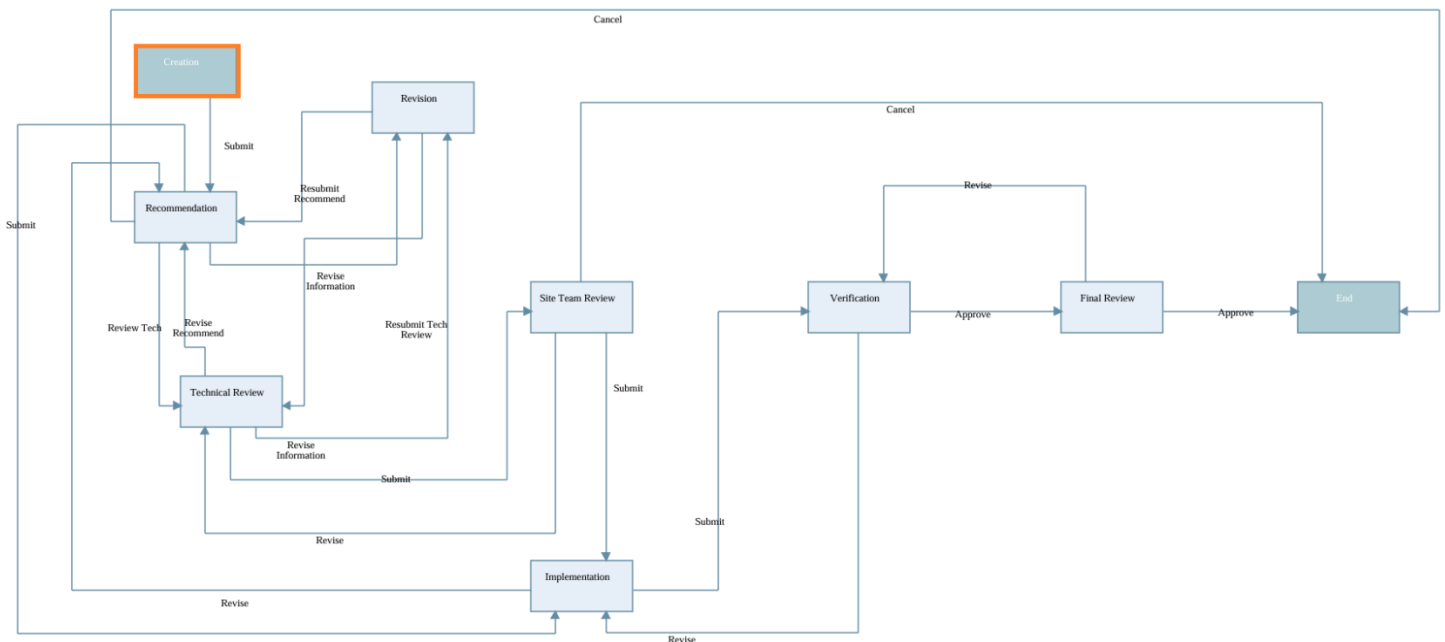
2. Step-by-Step Instructions

Note: Section 2.1 to 2.8 represents guidance for Non-Safety Workflow and Section 2.9 to 2.14 represents guidance for Safety Workflow.

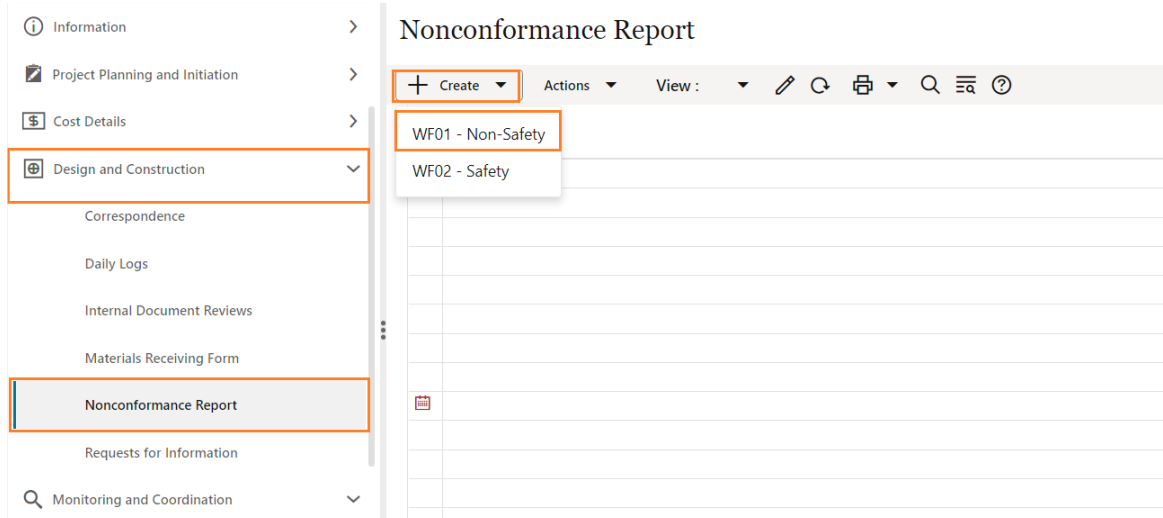
Non-Safety Workflow

2.1 Create a Nonconformance Report Record – Non-Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers.



1. In the left Navigator, click **Design and Construction > Nonconformance Report**
2. Click **+ Create & Select WF01Non-Safety**.





3. In the **General** section of the **Create New Nonconformance Report** window, enter text in the required field Title.
 - a. The **Title** is limited to 50 characters or less.

Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details

General

Record No

Title *

Status

Priority

Select

Due Date

Originator

Comments

Linked Records

Hide Clear Post

4. In the **Non-Conformance Details** Section, populate the following required fields.
 - a. **Nonconforming Party:** The “Nonconforming Party” is the individual or entity responsible for causing the nonconformance.
 - b. **Date of Occurrence:** The “Date of Occurrence” is the specific date and time when the nonconformance issue was identified or discovered.
 - c. **Description:** The “Description” is a detailed account of the nonconformance issue such as the Nature of Nonconformance, Specifics, Impact, and Supporting Evidence.

Non Conformance Details

Non conforming Party *

Select

Required

Date of Occurrence *

MM/DD/YYYY

Required

Oracle PO #

Type a Record No...

Contractor / Supplier Representative

Discipline/Department Impacted

Select

If Other Discipline/Department Impacted

Contractor / Supplier

NCR Category

Non-Safety

Description *

Required



5. Navigate to the **Document Details** tab and select **ADD**.
 - a. **Line Item**: The **Line Items** provide a comprehensive description of the nonconformance, associated documentation, and relevant details for each issue identified.

Create New Nonconformance Report

Non Conformance Report **Document Details**

Add Actions View Comments by: All [Download] [Refresh] [Print] [Search] [List View]

Folder

Line Item

File ID	Title	Discipline

6. Click **Add** and select **Line Item**.

Create New Nonconformance Report

Non Conformance Report **Document Details**

Add Actions View Comments by: All [Download]

Folder

Line Item

Line Item Details

Select

If Other Discipline/Department Impacted

Document #

Revision #

Sheet #

Cancel Save Save & Add New

Total: 2

7. In the **Line Items Details** Section, populate the following required fields.
 - a. **Name**
 - b. **Title**



Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details

Add Actions View Comments by: All

Folder Line Item

File ID	Title	Discipline

Total: 2

Line Item Details

File ID

Name *

Title *

Discipline/Department Impacted

Select

Cancel Save Save & Add New

8. Complete the mandatory and optional fields of the **Line-Item Details** Folder Details.

- Save
- Save & Add New

Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details

Add Actions View Comments by: All

Folder Line Item

File ID	Title	Discipline

Total: 2

Line Item Details

File ID

Name *

Title *

Discipline/Department Impacted

Select

Cancel Save Save & Add New

9. Once all mandatory and optional fields for the New **Nonconformance Report** 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.

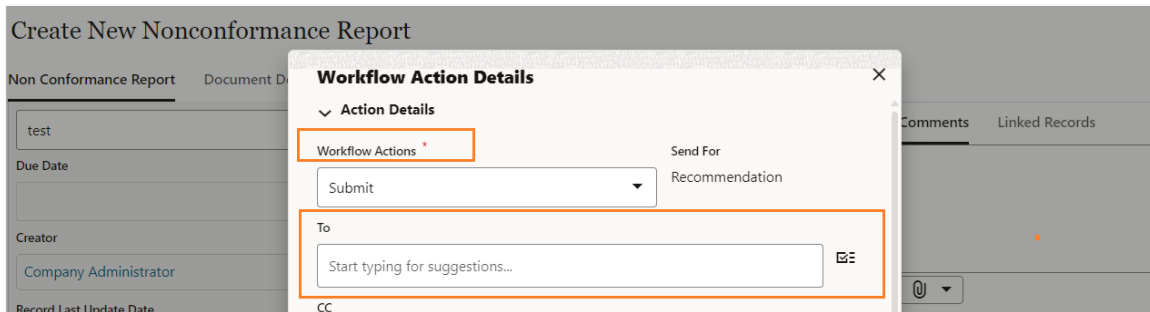
Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details



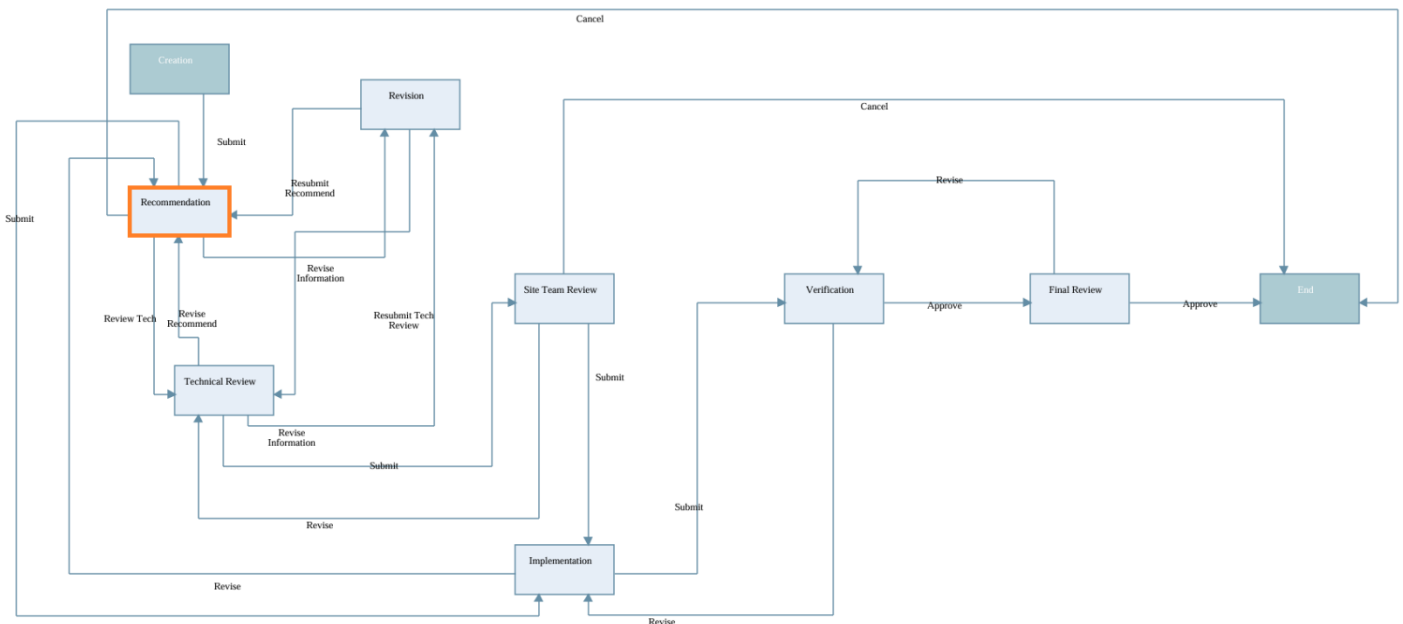
13. Verify **Submit** as the Workflow Action.
14. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
 - i. The assignees can be searched using the **Select** function .
15. Click **Send**.



The screenshot shows the 'Create New Nonconformance Report' form. The 'Workflow Action Details' pop-up window is open, showing the 'Action Details' section. The 'Workflow Actions' dropdown is set to 'Submit'. The 'To' field is highlighted with an orange box, showing a search bar with the placeholder text 'Start typing for suggestions...'. The 'Send For Recommendation' button is visible next to the 'To' field.

2.2 Recommendation of Nonconformance Report Record – Non-Safety

User Role(s): Construction Manager, Construction Team, Construction Quality



1. Click the Tasks option in the **Navigator**.
 - a. The **Task Log** will show available records.
2. Double-click the Nonconformance report BP with **Sent For** set to "Recommendation."
 - a. This will open the Nonconformance Report pop-up window.



Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Unifier Showcase Spri...	Nonconformance ...	NCR-000053	nSafety		Company Adminis...	Recommendation
Unifier Showcase Spri...	Change Order	CO-00035	Test R80		Hariharanath Mag...	Responsible Lead ...
Unifier Showcase Spri...	Nonconformance ...	NCR-000001	Safety_01		Rashmi Singh, SoCo	Recommendation

3. Click **Accept**. The page will refresh and show options to Send or Save

Nonconformance Report

Decline More Actions **Accept**

Non Conformance Report Document Details Issues Risks

4. As part of the Recommend step, the initiator may also complete the following actions:

- Post Comments:** Add text comments that are like notes that accompany the nonconformance Report record but do not become part of it. This field can be used to provide clarification or document recommendations made to the form.
- Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.
- Add Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
- Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
- Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. ([See Risks User Guide for more information](#))

Non Conformance Report Document Details Issues Risks

Recommendation

Reason Category *
Select

If Other Reason

Comments Linked Records Workflow Progress


5. **Navigate** to the **Nonconformance Report** Tab. Complete the following required fields in the **Recommendation** Block.

- Reason Category:** This dropdown field menu allows users to select a category that best describes the reason for creating the NCR. It helps classify the issue or non-conformance.
- Recommendation for Resolution:** A dropdown field where users choose an appropriate recommendation for resolving the issue that led to the NCR. This field guides corrective action.
- Engineer / Technical Approval Required:** The drop down field allows to users to select whether Approval is needed or not by selecting Yes or No.



- d. **Recommendation Explanation:** A text input field where users provide detailed information or an explanation regarding the chosen recommendation. It's essential for documenting the resolution process.

6. Once all mandatory and optional fields for the **New Nonconformance** 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.

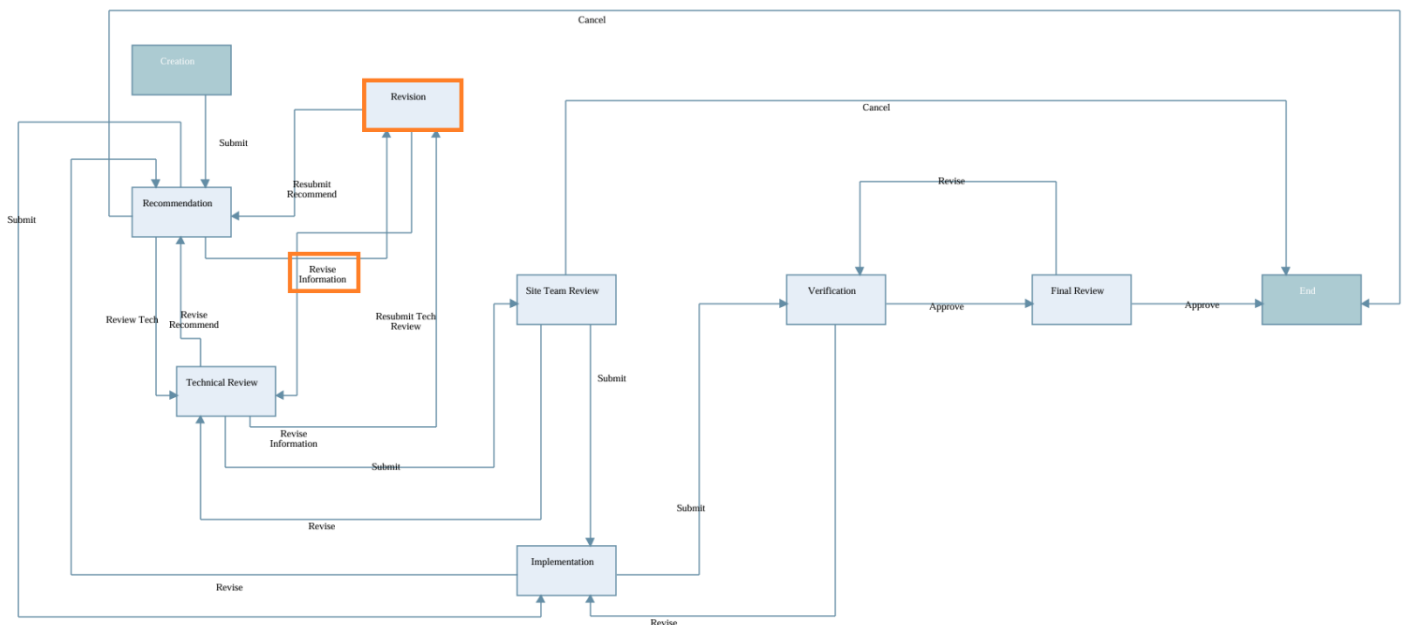
7. Verify **Revise Information** as the Workflow Action.
8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
- The assignees can be searched using the **Select** function  .



9. Click **Send**.

2.3 Revision of Nonconformance Report Record - Non-Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers



1. Click the **Tasks** option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Revision'.
 - a. This will open the NCR pop-up window.



Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Unifier Showcase Spri...	Nonconformance ...	NCR-000054	Non safety UG		Srihariprasath Bhar...	Revision
Unifier Showcase Spri...	Nonconformance ...	NCR-000053	nSafety		Srihariprasath Bhar...	Revision

3. Click **Accept**.
 - a. The page will refresh and show options to Send or Save.

Nonconformance Report

Decline More Actions **Accept**

Non Conformance Report Document Details Issues Risks

4. As part of the revision step, the initiator may also complete the following actions:
 - a. **Attach Documents:** Attach files to be routed with the form. These attachments may be supporting documents and can also be included in the Comments section.
 - b. **Post Comments:** Add text comments that are like notes that accompany the record but do not become part of it. This field can be used to provide clarification or document revisions made to the form.
 - c. **Add Document Details:** “Document Details” in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
 - d. **Add Risks:** The “Risks” tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. [\(See Risks User Guide for more information\)](#)


Nonconformance Report

Save Draft More Actions **Send**

Non Conformance Report Document Details Risks

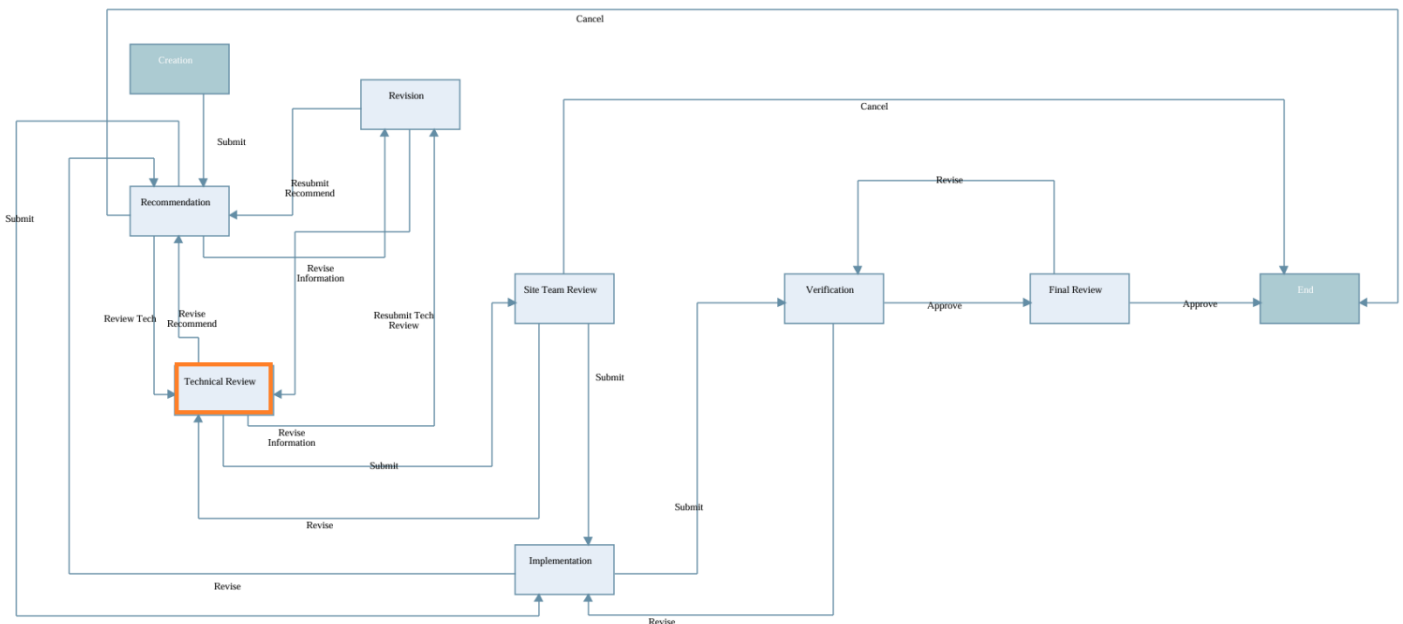
5. Click **Send**.
 - i. The Workflow Actions Details pop-up window will display.
6. Click the dropdown arrow in the Workflow Actions field.
7. Click **Resubmit Tech Review**.



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 reassign the record to.
 - i. The assignees can be searched using the **Select** function .
9. Click **Send**

2.4 Technical Review of Nonconformance Report Record-Non-Safety

User Role(s): Project Engineer, Construction Quality, Partner Engineer



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Technical Review'.
 - b. This will open the Nonconformance Report pop-up window.

☰ Tasks

🔔 Notifications

📁 Drafts

🔒 Shell Access Request

Tasks

+

Create

Actions

View: Received in last 7 days

✎

↺

🖨

🔍

☰

✔️	🔗	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
✔️		Unifier Showcase Pri...	Nonconformance ...	NCR-000054	Non safety UG		Soumitra Mandal -...	Technical Review	



3. Navigate to the **Nonconformance Report** Tab and complete the Required Field in the **Technical Review** Block.
 - c. **Response Status.**

Non Conformance Report | Document Details | Issues | Risks

Technical Review

Response Status *
Approved

Design Document to be Revised?
Select

Clarification

4. As part of the Technical Review step, the Reviewer may also complete the following actions:
 - a. **Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.
 - b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.
 - c. **Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
 - d. **Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
 - e. **Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost ([See Risks User Guide for more information](#)).

Nonconformance Report

Non Conformance Report | Document Details | Issues | Risks

Technical Review

Response Status *
Approved

Design Document to be Revised?
Select

Clarification

Comments | Linked Records | Workflow Progress | Audit Log

Clear Post

5. Once all mandatory and optional fields for the **New Nonconformance Report** 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.



Nonconformance Report


Save Draft

More Actions ▾

Send

Non Conformance Report Document Details Issues Risks

Comments Linked Records Workflow Progress Audit Log > []

6. Verify **Submit** as the Workflow Action.
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 reassign the record to.
 - i. The assignees can be searched using the **Select** function  .

Nonconformance Report

Non Conformance Report

Resolution

Workflow Action Details

▼ Action Details

Workflow Actions *


Submit

Send For

Site Team Review

To

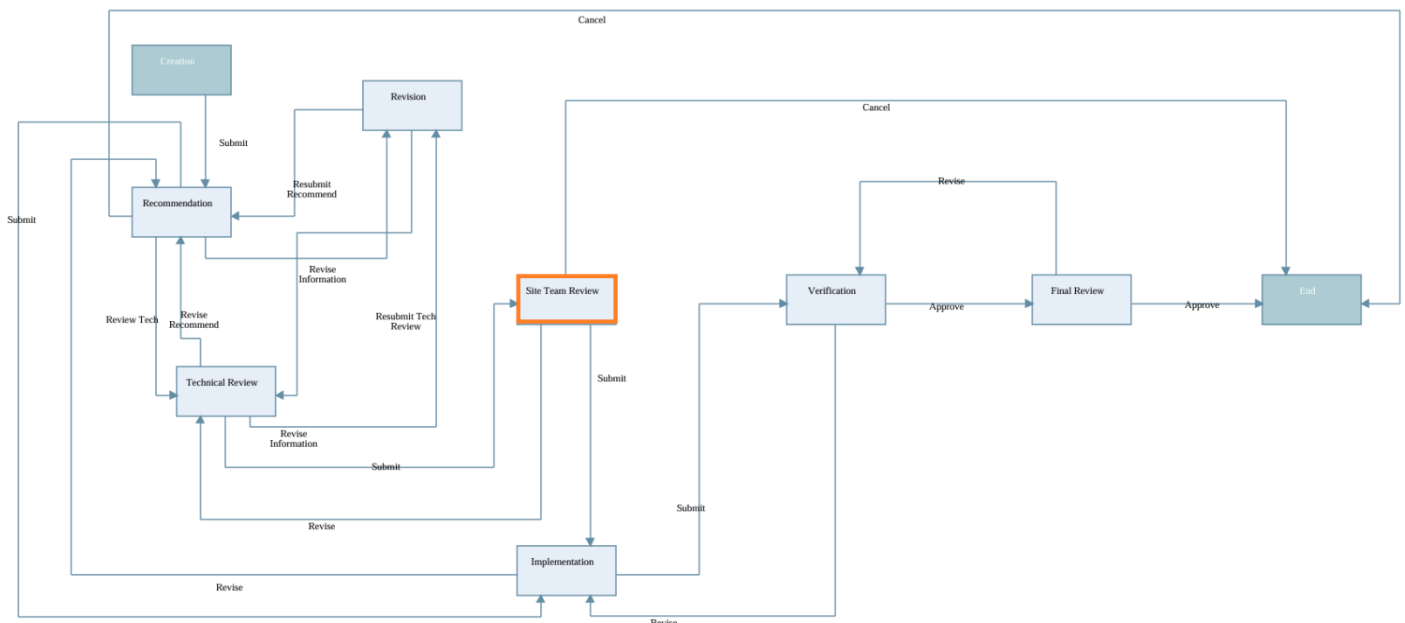
Start typing for suggestions...



8. Click **Send**.

2.5 Site Team Review of Nonconformance Report Record - Non-Safety


User Role(s): All Project Users, Partner Contractors, Partner Engineers



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Site Team Review'.



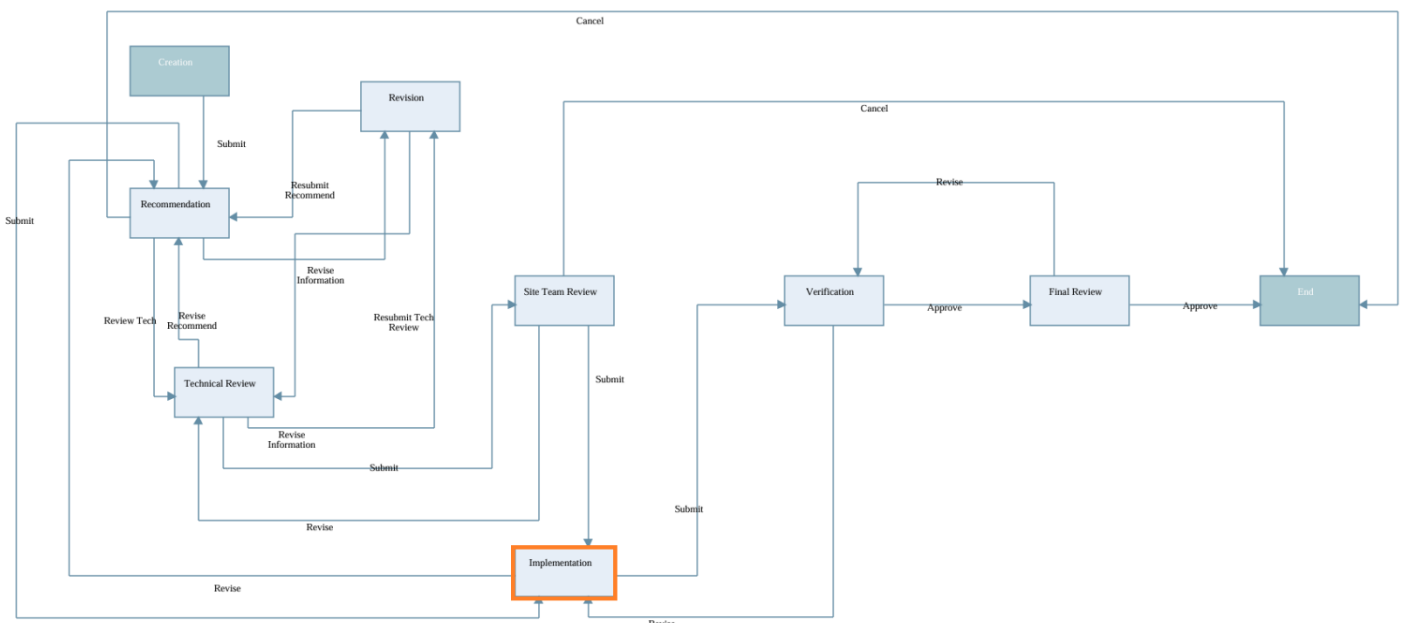
5. Once all mandatory and optional fields for the **New Nonconformance Report** are complete, click **Send** at the top right of the form.
 - a. The **Workflow Actions Details** pop-up window will display.
 - b. You can also click **Save Draft** to revisit later.

6. Verify **Submit** as the Workflow Action.
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 reassign the record to.
 - i. The assignees can be searched using the **Select** function .

8. Click **Send**.

2.6 Implementation of Nonconformance Report Record – Non-Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Implementation'.
 - b. This will open the Nonconformance Report pop-up window.

Tasks

Notifications

Drafts

Shell Access Request

Tasks

+

Create

Actions

View: Received in last 7 days

	Origin	Business Process	Record Number	Title	Record Due	From	Sent for
	Unifier Showcase Spr...	Nonconformance ...	NCR-000054	Non safety UG		Pilli Anusha- Const...	Implementation

- 4. Click **Accept**.** The page will refresh and show options to Send or Save.

Nonconformance Report

Decline

More Actions

Accept

Non Conformance Report

Document Details

Issues

Risks

- 5. In the Implementation Block, populate the following required fields.**
- a. **Resolution Completed Date:** Type or select the date when the record was resolved. This signifies corrective action has been taken. This data is essential to ensure timely resolution and compliance with quality standards.
 - b. **Resolution:** Enter details of when, how, and where corrective and preventive actions were taken. Record the User responsible for acknowledging and signing off on the resolution.

Nonconformance Report

Save DraftMore Actions ▾Send

Non Conformance Report

Document DetailsIssuesRisks

✓ Implementation

Resolution Completed Date *

MM/DD/YYYY

Required

Resolution *

Required

CommentsLinked RecordsWorkflow P> []

▾


ClearPost

- 6.** As part of the Site Team Review, the Reviewer may also complete the following actions:
- Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.



- b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the
- c. **Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
- d. **Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
- e. **Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. ([See Risks Items User Guide for more information](#))

- 7. Once all mandatory and optional fields for the **New Nonconformance Report** 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. Verify **Submit** as the Workflow Action.
- 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 reassign the record to.
 - i. The assignees can be searched using the **Select** function  .



Nonconformance Report Save Draft More Actions Send

Non Conformance Re

Clarification

Workflow Action Details

✓ **Action Details**

Workflow Actions * Send For Verification

Submit

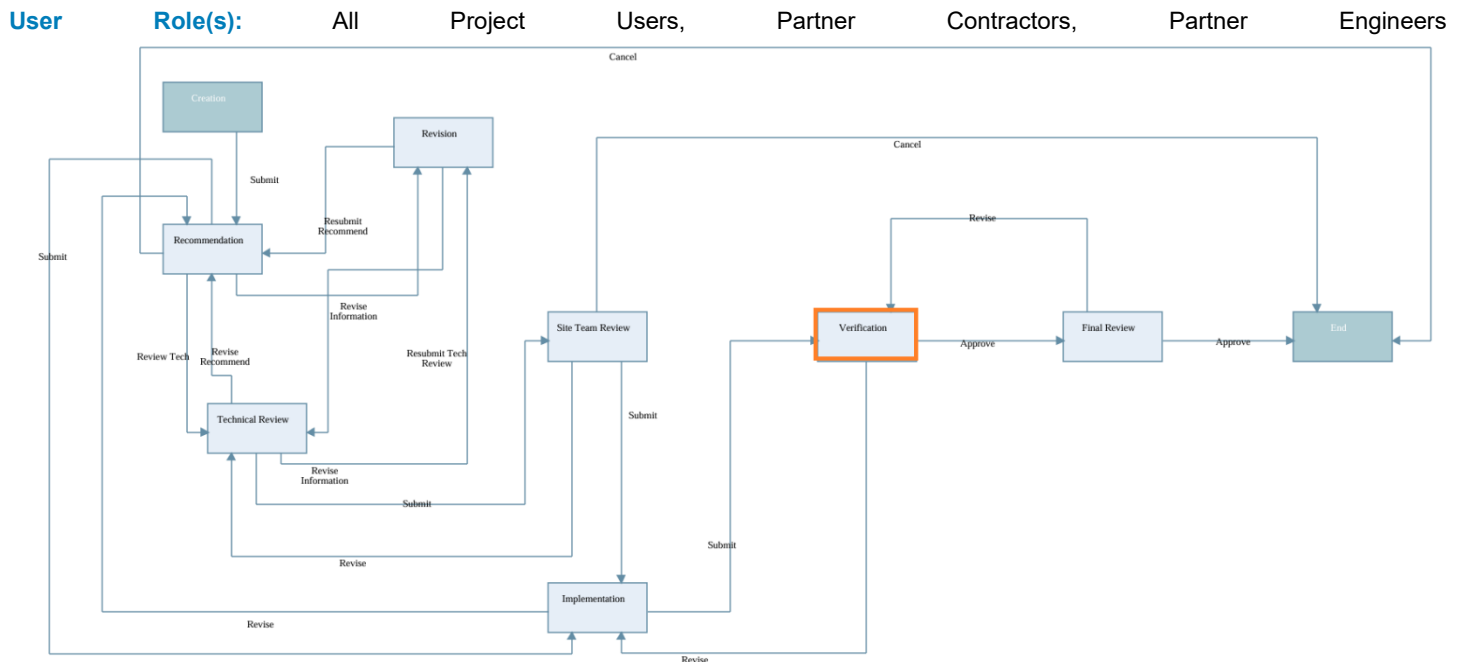
To

Start typing for suggestions...

Clear Post

10. Click **Send**.

2.7 Verification of Nonconformance Report Record-Non-Safety



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Verification'.
 - a. This will open the Nonconformance Report pop-up window.

Tasks	Tasks						
Notifications	+ Create Actions View: Received in last 30 days						
Drafts							
Shell Access Request							
Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Ta
Unifier Showcase Spri...	Nonconformance ...	NCR-000054	Non safety UG		Hariharanath Mag...	Verification	
Unifier Showcase Spri...	Scope Statement	SS-01803	Test	06/24/2024 03:08 ...	Company Adminis...	Approve	



3. Click **Accept**. The page will refresh and show options to Send or Save

The image shows the top section of the Nonconformance Report interface. It features a title 'Nonconformance Report' on the left. To the right are three buttons: 'Decline' (disabled), 'More Actions' (with a dropdown arrow), and 'Accept' (highlighted with an orange border). Below these are four tabs: 'Non Conformance Report' (active), 'Document Details', 'Issues', and 'Risks'.

4. As part of the Recommend step, the initiator may also complete the following actions:

- Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.
- Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.
- Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
- Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
- Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. ([See Risks Items User Guide for more information](#)).


The image shows the main form area of the Nonconformance Report. It has a header with tabs: 'Non Conformance Report' (active), 'Document Details', 'Issues', and 'Risks'. Below the tabs is a 'Recommendation' section. It contains a 'Reason Category' dropdown menu with 'Select' as the current value, marked as 'Required'. To the right of this is a text input field labeled 'If Other Reason'. On the far right, there are three sub-tabs: 'Comments' (active), 'Linked Records', and 'Workflow Progress'.

5. **Navigate** to the **Nonconformance Report** Tab. Complete the following required fields in the **Verification** Block.

- Resolution Verification date**
- Verification Comments**



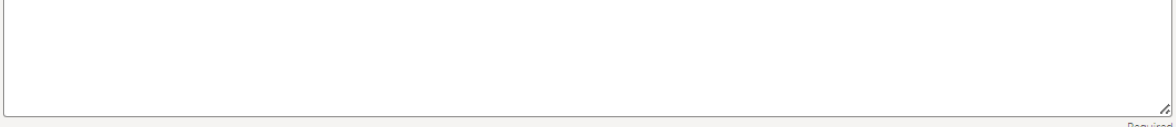
Verification


Resolution Verification date *
MM/DD/YYYY  Required

Change order required?
Select

Rework/ Repair Occur?
Select

Estimated cost of Rework/ repair
0.00

Verification Comments *
 Required

Scope Impacted by this NCR


6. Once all mandatory and optional fields for the **New Nonconformance** 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.

Nonconformance Report


Save Draft More Actions **Send**

Non Conformance Report Document Details Issues Risks

Comments Linked Records Workflow >

Recommendation

Reason Category * If Other Reason

7. Verify **Approve** as the Workflow Action.
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 reassign the record to.
- The assignees can be searched using the Select function .

Nonconformance Report


Non Conformance Report

Workflow Action Details

Action Details

Workflow Actions *
Approve

Send For
Final Review

To
Start typing for suggestions... 

Resolution Completed Date
06/28/2024

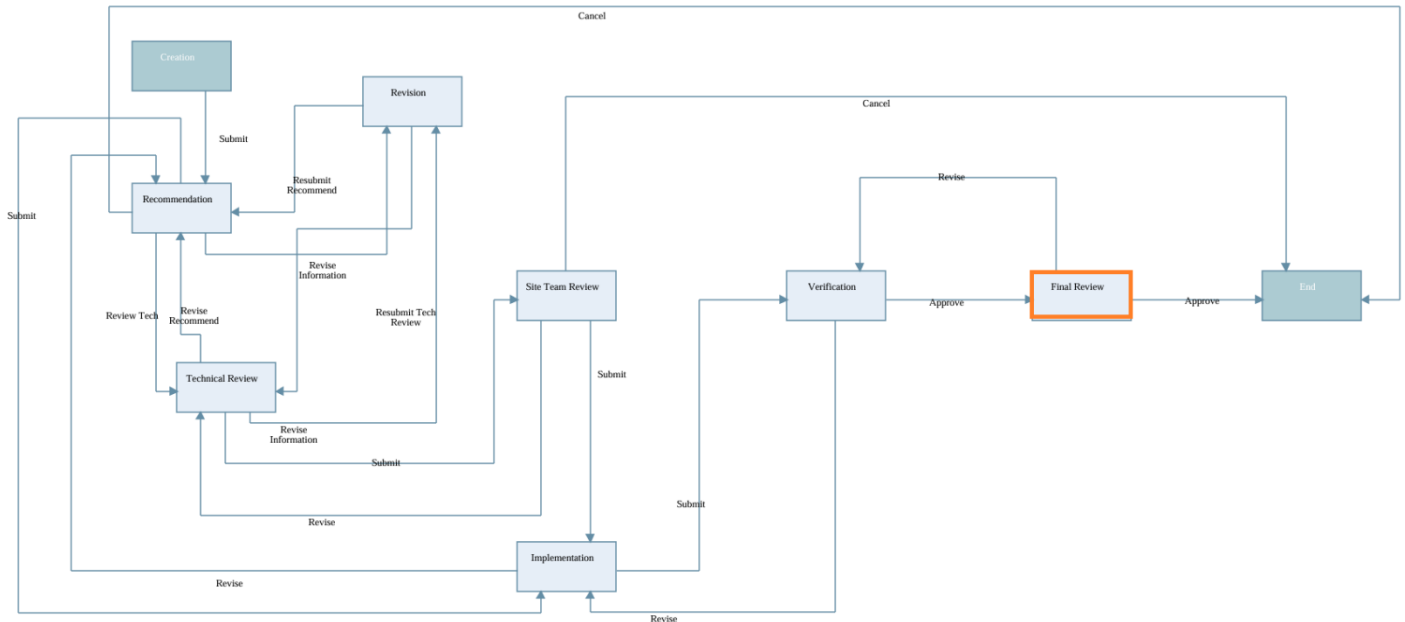
Resolution



9. Click **Send**.

2.8 Final Review of Nonconformance Report Record – Non-Safety

User Role(s): Construction Manager, Construction Team, Construction Quality, Project Manager.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Final Review'.
 - a. This will open the Nonconformance Report pop-up window.

Tasks	Tasks							
Notifications	+ Create Actions View: All Tasks							
Drafts								
Shell Access Request								
	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Task Due
✓	Unifier Showcase Spri...	Nonconformance ...	NCR-000054	Non safety UG		Pilli Anusha- Const...	Final Review	
✓	Unifier Showcase Spri...	Change Order	CO-00035	Test R80		Hariharanath Mag...	Responsible Lead ...	

3. Click **Accept**. The page will refresh and show options to Send or Save

Nonconformance Report

Decline More Actions **Accept**

Non Conformance Report Document Details Issues Risks

Task Details

From
Pilli Anusha- Construction Quality

Comments

Linked Records

Workflow P



4. As part of the Site Team Review, the Reviewer may also complete the following actions:
- Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to **provide clarification or document Recommendations made to the form.**
 - Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.
 - Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
 - Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
 - Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost ([See Risks Items User Guide for more information](#)).

Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details Issues Risks

General

Record No: NCR-000054 Status: In_Review

Title: Non safety UG Priority: High

Due Date: Originator: Soumitra Mandal - All Project

Comments Linked Records Workflow Progress

Clear Post

9. Once all mandatory and optional fields for the **New Nonconformance Report** 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.

Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details Issues Risks

Comments Linked Records Workflow Progress Audit Log

10. Verify **Approve** 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 reassign the record to.
- The assignees can be searched using the **Select** function .



Nonconformance Report

Non Conformance Report

General

Record No
NCR-000054

Title
Non safety UG

Due Date

Creator
Soumitra Mandal - All Project U

Record Last Update Date
06/13/2024 12:00 AM

Non Conformance Details

Non conforming Party

Workflow Action Details

✓ Action Details

Workflow Actions *

Approve

Send For
End

Cancel Send

Clear Post

Information
Comments are available.

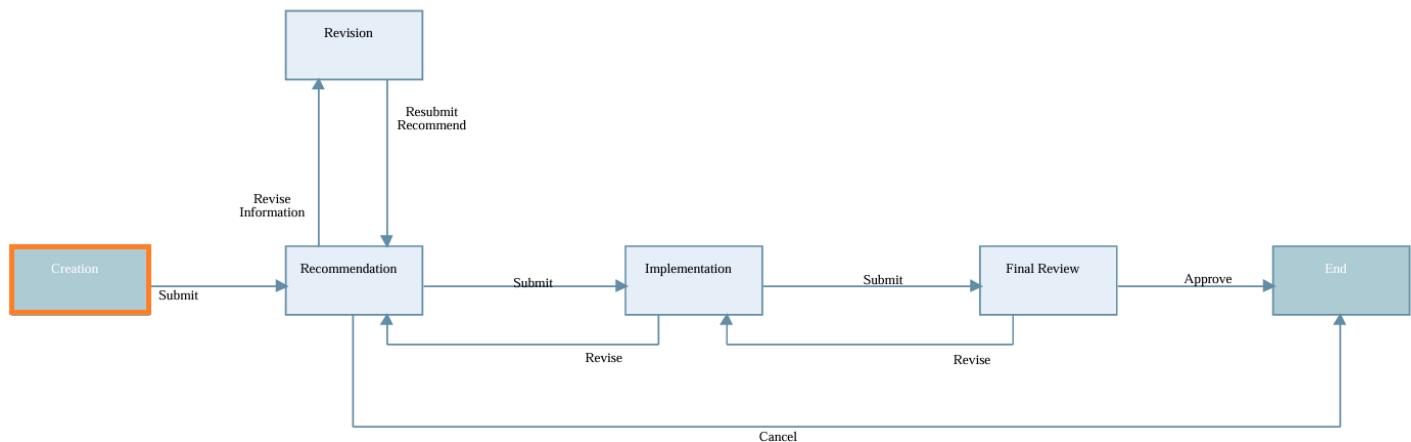
12. Click **Send**.



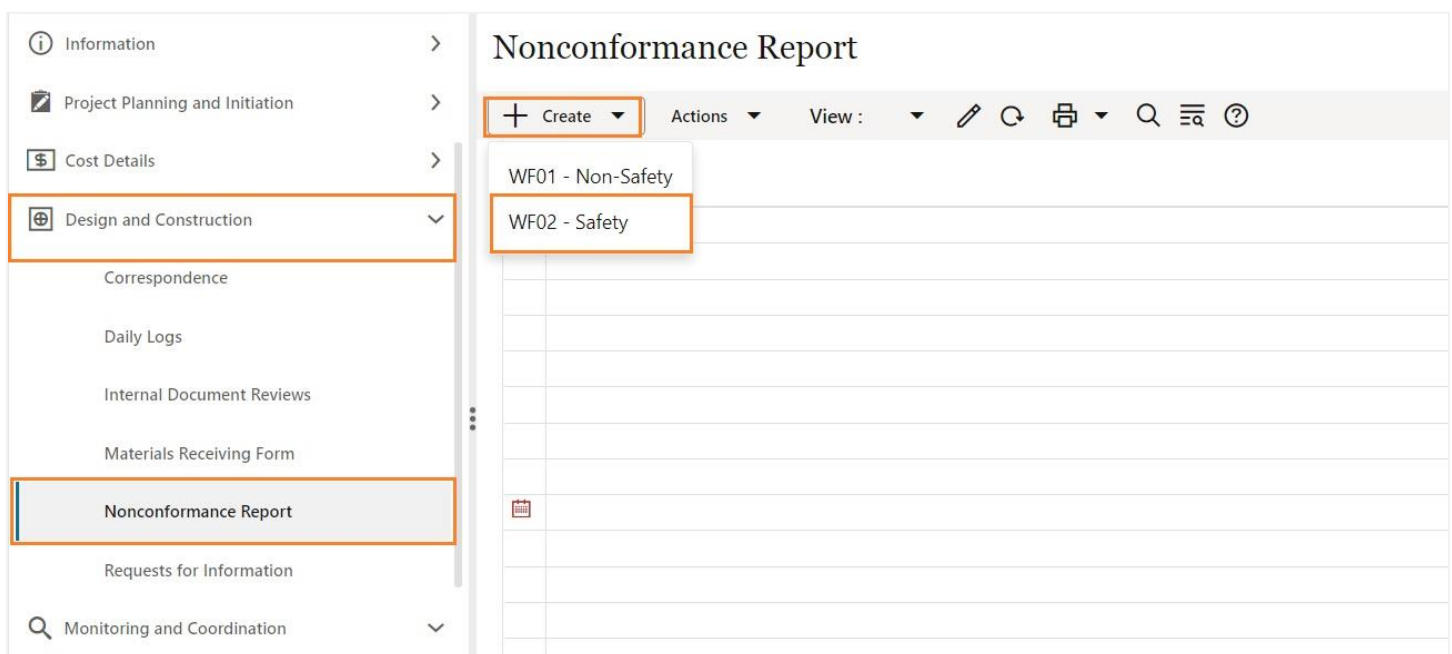
Safety Workflow

2.9 Create a Nonconformance Report Record – Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers.



1. In the left Navigator, click **Design and Construction > Nonconformance Report**
2. Click **+ Create** and **Select WF02-Safety**.



3. In the **General** section of the **Create New Nonconformance Report** window, enter text in the required field Title.
 - a. The **Title** is limited to 50 characters or less.



Create New Nonconformance Report

[Save Draft](#)[More Actions](#) ▼[Send](#)

Non Conformance Report

Document Details

▼ **General**

Record No

Status

Title *

Priority

Select ▼

Due Date

Originator

Comments

Linked Records

▼

☒ Hide

Clear

Post

4. In the **Non-Conformance Details** Section, populate the following required fields.

- Non-conforming Party:** Select the individual or entity responsible for causing the nonconformance.
- Date of Occurrence:** Select the specific date and time when the nonconformance issue was identified or discovered.
- Description:** Provide a detailed account (*4000 or fewer characters*) of the nonconformance issues such as Nature of Nonconformance, Specifics, Impact, and Supporting Evidence.

▼ **Non Conformance Details**

Non conforming Party *

Select ▼

Date of Occurrence *

MM/DD/YYYY

Oracle PO #

Type a Record No... ▼

Contractor / Supplier Representative

Discipline/Department Impacted

Select

If Other Discipline/Department Impacted

Contractor / Supplier

NCR Category

Non-Safety

Description *

5. Navigate to the **Document Details** tab and select **ADD**.

- Folder:** The **Folder** is a structured repository within the report or its associated system that holds all pertinent information about nonconformance.
- Line Item:** The **Line item provides** a comprehensive description of the nonconformance, associated documentation, and relevant details for each issue identified.



6. Click **Add**, Select **Line Item**.

Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details

Add Actions View Comments by: All

Folder Line Item

File ID	Title	Disciplin
---------	-------	-----------

Total: 2

Line Item Details

Select

If Other Discipline/Department Impacted

Document #

Revision #

Sheet #

Cancel Save Save & Add New

7. In the **Line Items Details** Section, populate the following required fields.

- Name**
- Title**

Create New Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details

Add Actions View Comments by: All

Folder Line Item

File ID	Title	Disciplin
---------	-------	-----------

Total: 2

Line Item Details

File ID

Name *

Title *

Discipline/Department Impacted

Select


Cancel Save Save & Add New

8. Complete the mandatory and optional fields of the **Line-Item Details** Folder Details.

- Save**
- Save & Add New**



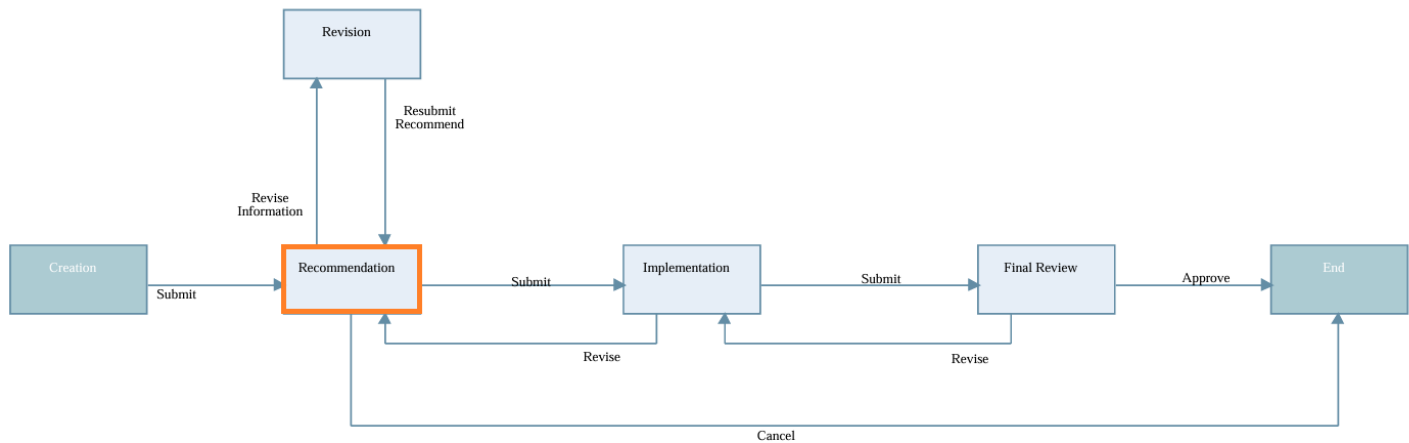
9. Once all mandatory and optional fields for the New **Nonconformance Report** are complete, click **Send** at the top right of the form.
- The **Workflow Actions Details** pop-up window will display.
 - You can also click **Save Draft** to revisit later.

13. Verify **Submit** as the Workflow Action.
14. 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 reassign the record to.
- The assignees can be searched using the **Select** function .
15. Click **Send**.



2.10 Recommendation of Nonconformance Report Record - Safety

User Role(s): Construction Manager, Construction Team, Construction Quality



1. Click the Tasks option in the **Navigator**.
 - a. The **Task Log** will show available records.
2. Double-click the Nonconformance report BP with **Sent For** set to 'Recommendation.'
 - b. This will open the Nonconformance Report pop-up window.

Tasks

Notifications

Drafts

Shell Access Request

Document Manager >

Tasks

+ Create

Actions

View: All Tasks

✎

↺

🖨

🔍

☰

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Unifier Showcase Spri...	Nonconformance ...	NCR-000053	nSafety		Company Adminis...	Recommendation
Unifier Showcase Spri...	Change Order	CO-00035	Test R80		Hariharanath Mag...	Responsible Lead ...
Unifier Showcase Spri...	Nonconformance ...	NCR-000001	Safety_01		Rashmi Singh, SoCo	Recommendation

3. Click **Accept**. The page will refresh and show options to Send or Save

Nonconformance Report

Decline

More Actions

Accept

Non Conformance Report

Document Details

Issues

Risks

4. As part of the Recommend step, the initiator may also complete the following actions:
 - a. **Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.
 - b. **Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.



- c. **Add Document Details:** “Document Details” in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
- d. **Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
- e. **Add Risks:** The “Risks” tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. ([See Risks User Guide for more information](#))

The screenshot shows the 'Non Conformance Report' form with three tabs: 'Document Details', 'Issues', and 'Risks'. The 'Document Details' tab is active. Below the tabs, there are three sub-tabs: 'Comments', 'Linked Records', and 'Workflow Progress'. The 'Recommendation' section is expanded, showing a 'Reason Category' dropdown menu with 'Select' as the current value, and a text input field for 'If Other Reason'. Both fields are marked as 'Required'.

5. Navigate to the Nonconformance Report Tab. Complete the following required fields in the Recommendation Block.

- a. **Reason Category**
- b. **Recommendation for Resolution**
- c. **Engineer / Technical Approval Required**
- d. **Recommendation Explanation**

The screenshot shows the 'Recommendation' block of the form. It contains four required fields, each highlighted with an orange box: 'Reason Category' (a dropdown menu with 'Select' as the current value), 'Recommendation for Resolution' (a dropdown menu with 'Select' as the current value), 'Engineer / Technical Approval Required ?' (a dropdown menu with 'Select' as the current value), and 'Recommendation Explanation' (a large text area). Each field is marked as 'Required'.

6. Once all mandatory and optional fields for the New Nonconformance 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.



Nonconformance Report


Save Draft More Actions **Send**

Non Conformance Report Document Details Issues Risks

Comments Linked Records Workflow >

Recommendation

Reason Category * If Other Reason

7. Verify **Revise Information** as the Workflow Action.
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 reassign the record to.
 - i. The assignees can be searched using the **Select** function  .

Nonconformance Report

Non Conformance Report Document Details Issues Risks

Recommendation Explanation *

hfgch


Workflow Action Details

Action Details

Workflow Actions * Send For Revision

Revise Information

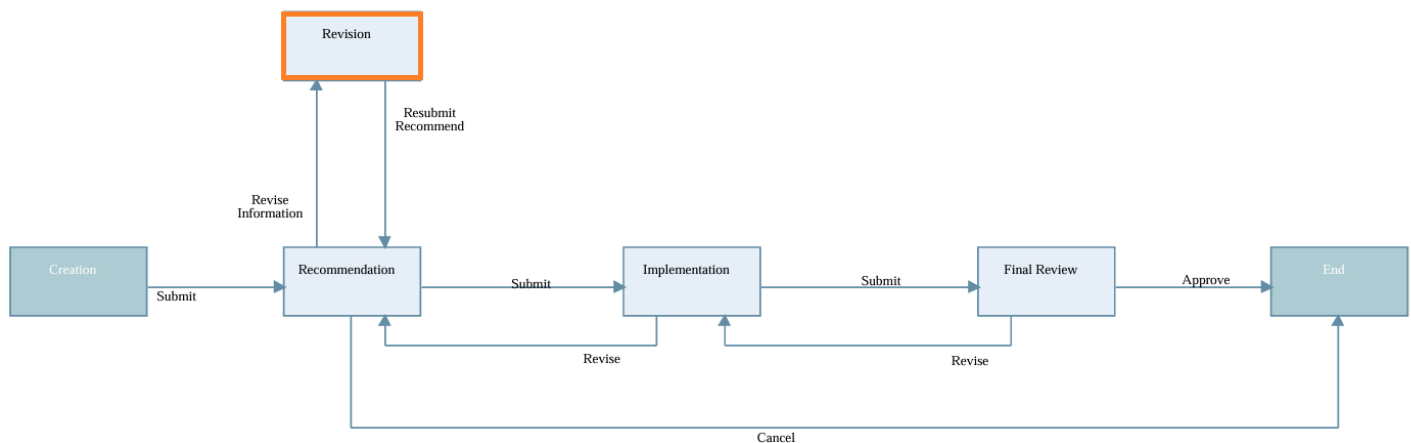
To

Start typing for suggestions... 

9. Click **Send**.

2.11 Revision of Nonconformance Report Record- Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers



1. Click the Tasks option in the **Navigator**.
 - b. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Revision'.



c. This will open the NCR pop-up window.

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Unifier Showcase Spri...	Nonconformance ...	NCR-000054	Non safety UG		Srihariprasath Bhar...	Revision
Unifier Showcase Spri...	Nonconformance ...	NCR-000053	nSafety		Srihariprasath Bhar...	Revision

3. As part of the revision step, the initiator may also complete the following actions:

- Add Document Details:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions. If users cannot see the record in the log, they cannot see it in the link.
- Add Risks:** The “Risks” tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost ([See Risks User Guide for more information](#)). user can identify risks that may impact schedule, scope, and cost.

Nonconformance Report

Non Conformance Report Document Details Risks

Save Draft More Actions Send

4. Click **Send**.

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

5. Click the dropdown arrow in the Workflow Actions field.

6. Click **Resubmit Recommend**.

Nonconformance Report

Non Conformance Report

Workflow Action Details

Action Details

Workflow Actions * Send For

Resubmit Recommend Recommendation

To

Start typing for suggestions...

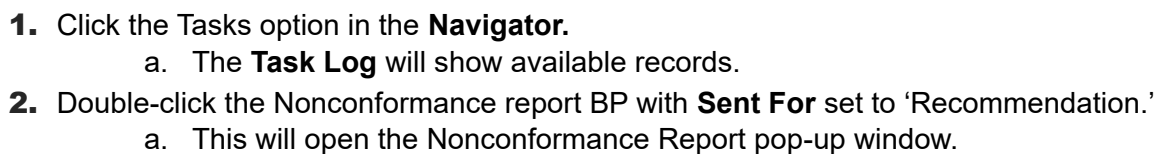
Record No: NCR-000053

Title: nSafety

Clear Post

- ## 8. Click Send

User Role(s): All Project Users, Partner Contractors, Partner Engineers



3. Click **Accept.** The page will refresh and show options to Send or Save

37



4. **Navigate** to the **Nonconformance Report** Tab. Complete the following required fields in the **Recommendation** Block.
- Reason Category**
 - Recommendation for Resolution**
 - Engineer / Technical Approval Required**
 - Recommendation Explanation**

Recommendation

Reason Category *
Select
Required

If Other Reason
[Text Field]

Recommendation for Resolution *
Select
Required

Engineer / Technical Approval Required ? *
Select
Required

Recommendation Explanation *
[Text Area]
Required

5. As part of the Recommend step, the initiator may also complete the following actions:


- Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.
- Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.
- Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
- Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
- Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with Nonconformance Report. user can identify risks that may impact schedule, scope, and cost. ([See Risks User Guide for more information](#))



The screenshot shows the 'Non Conformance Report' form. At the top, there are tabs: 'Document Details', 'Issues', and 'Risks'. Below these, the 'Recommendation' section is expanded, showing a 'Reason Category' dropdown menu and a text field for 'If Other Reason'. To the right, there are more tabs: 'Comments', 'Linked Records', and 'Workflow Progress'.

6. Once all mandatory and optional fields for the **New Nonconformance** 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.

This screenshot shows the top right of the 'Nonconformance Report' form. It includes a 'Save Draft' button, a 'More Actions' dropdown menu, and a 'Send' button. Below these, the 'Recommendation' section is visible, with a 'Reason Category' dropdown and a text field for 'If Other Reason'.

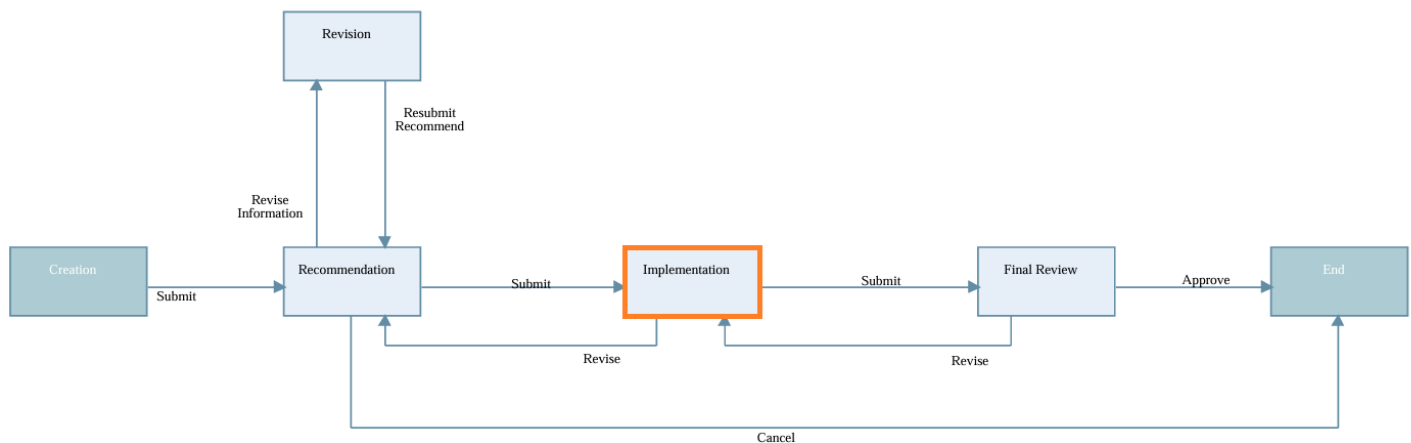
7. Verify **Submit** as the Workflow Action.
8. In the **To** field click the text box ('Start typing for suggestions...') and type the name of the person(s) or group(s) to select the role to reassign the record to.
 - i. The assignees can be searched using the **Select** function .

The screenshot shows a 'Workflow Action Details' pop-up window. It has a title bar with a close button. Inside, there's a section for 'Action Details' with a 'Workflow Actions' dropdown menu set to 'Submit'. To the right, it says 'Send For Implementation'. Below this is a 'To' field with a text box containing 'Start typing for suggestions...' and a 'Select' icon.

9. Click **Send**.

2.13 Implementation of Nonconformance Report Record - Safety

User Role(s): All Project Users, Partner Contractors, and Partner Engineers.



1. Click the Tasks option in the **Navigator**.
 - a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Implementation'.
 - a. This will open the Nonconformance Report pop-up window.

The screenshot shows the 'Tasks' section of the application. On the left, a sidebar contains 'Tasks', 'Notifications', 'Drafts', and 'Shell Access Request'. The main area is titled 'Tasks' and features a table with the following data:

Origin	Business Process	Record Number	Title	Record Due	From	Sent for
Unifier Showcase Spri...	Nonconformance ...	NCR-000053	Safety		Srihariprasath Bhar...	Implementation

6. Click **Accept**. The page will refresh and show options to **Send** or **Save**.

The screenshot shows the 'Nonconformance Report' form. At the top, there is a title 'Nonconformance Report' and three buttons: 'Decline', 'More Actions', and 'Accept' (which is highlighted with an orange border). Below the title, there are four tabs: 'Non Conformance Report', 'Document Details', 'Issues', and 'Risks'.

4. In the **Implementation** Block, populate the following required fields.
 - a. **Resolution Completed Date:** Type or select the date when the record was resolved. This signifies corrective action has been taken. This data is essential to ensure timely resolution and compliance with quality standards.
 - b. **Resolution:** Enter details of when, how, and where corrective and preventive actions were taken. Record the User responsible for acknowledging and signing off on the resolution.



Nonconformance Report

Non Conformance Report

Document Details

Issues

Risks

Implementation

Resolution Completed Date *

MM/DD/YYYY

Required

Resolution *

Required

Comments

Linked Records

Workflow P

>

⌵

📎

▼

Clear

Post

i

5. As part of the Site Team Review, the Reviewer may also complete the following actions:
- Post Comments:** Add text comments that are like notes that accompany the Nonconformance Report record but do not become part of it. This field can be used to provide clarification or document Recommendations made to the form.
 - Add Linked Records:** Create a link from one business process to another. This option is available only in BPs that have been designed to accommodate linked records. A user's ability to view a linked BP record is based on the user's permissions.
 - Create Document Details:** "Document Details" in a Nonconformance Report (NCR) record captures essential information related to the nonconformance. This includes details such as the date, time, location, nature of the nonconformance, and any other relevant information.
 - Add an Issues:** Add an Issues Record to formally document and track steps required to address and resolve the identified issue, ensuring accountability and timely completion of necessary actions ([See Issues User Guide for more information](#)).
 - Add Risks:** The "Risks" tab focuses on assessing and managing potential risks associated with the Nonconformance Report Record. user can identify risks that may impact schedule, scope, and cost. ([See Risks User Guide for more information](#)).

Nonconformance Report

Save Draft

More Actions

Send

Non Conformance Report

Document Details

Issues

Risks

General

Record No

NCR-000054

Status

In_Review

Title

Non safety UG

Priority

High

Due Date

Originator

Soumitra Mandal - All Proje

Creator

Soumitra Mandal - All Project

Creation Date

06/12/2024 01:00 AM

Comments

Linked Records

Workflow P

>

⌵

📎


▼

Clear

Post



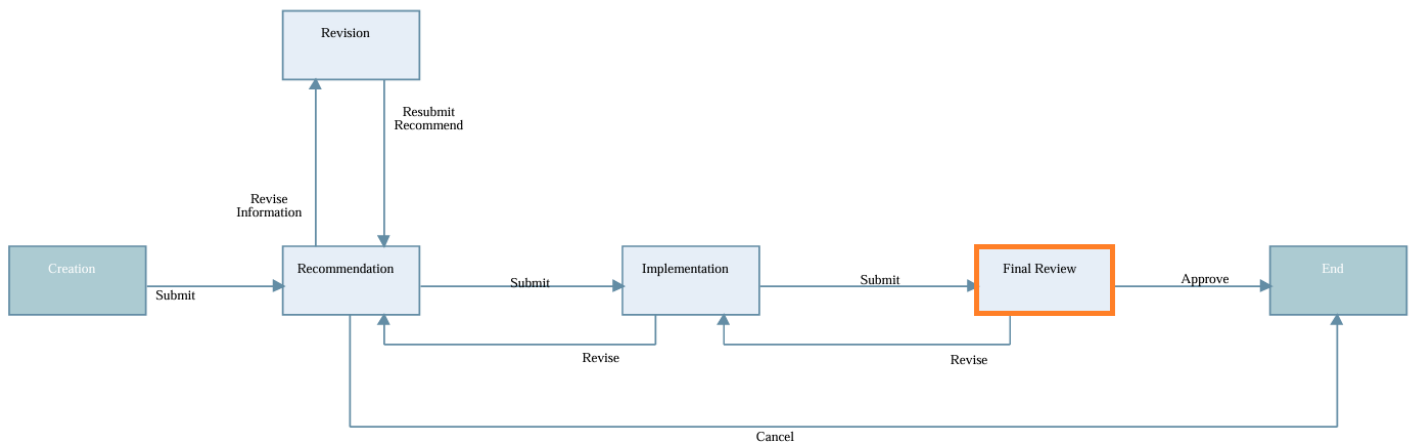
6. Once all mandatory and optional fields for the **New Nonconformance Report** are complete, click **Send** at the top right of the form.
 - a. The **Workflow Actions Details** pop-up window will display.
 - a. You can also click **Save Draft** to revisit later.

7. Verify **Submit** as the Workflow Action.
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 reassign the record to.
 - i. The assignees can be searched using the **Select** function .

9. Click **Send**.

2.14 Final Review of Nonconformance Report Record - Safety

User Role(s): Construction Manager, Construction Team, Construction Quality, Project Manager.



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



- a. **Task Log** will show available records.
2. Double-click the Nonconformance Report BP with Sent for 'Final Review'.
 - b. This will open the Nonconformance Report pop-up window.

☰ Tasks

🔔 Notifications

📄 Drafts

🔑 Shell Access Request

📁 Document Manager >

Tasks

+

Create

Actions ▾

View: All Tasks ▾

✎

↺

🖨

▾

🔍

☰

✔	🔖	Origin	Business Process	Record Number	Title	Record Due	From	Sent for	Tas
✔		Unifier Showcase Sprint 1	Nonconformance ...	NCR-000053	Safety		Hariharanath Mag...	Final Review	
✔		Unifier Showcase Sprint 1	Change Order	CO-00035	Test R80		Hariharanath Mag...	Responsible Lead ...	
✔		Unifier Showcase Sprint 1	Nonconformance ...	NCR-000001	Safety_01		Rashmi Singh, SoCo	Recommendation	



Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details Issues Risks

General

Record No: NCR-000054 Status: In_Review

Title: Non safety UG Priority: High

Due Date: Originator: Soumitra Mandal - All Project

Comments Linked Records Workflow Progress

Clear Post

5. Once all mandatory and optional fields for the **New Nonconformance Report** 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.

Nonconformance Report

Save Draft More Actions Send

Non Conformance Report Document Details Issues Risks

Comments Linked Records Workflow Progress Audit Log

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

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 reassign the record to.

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

Nonconformance Report

Workflow Action Details

Action Details

Workflow Actions * Approve

Send For End

Cancel Send

Information



8. Click **Send**.



2.15 Related Business Processes

The Nonconformance Report business process is interconnected with other business processes within Unifier as detailed below:

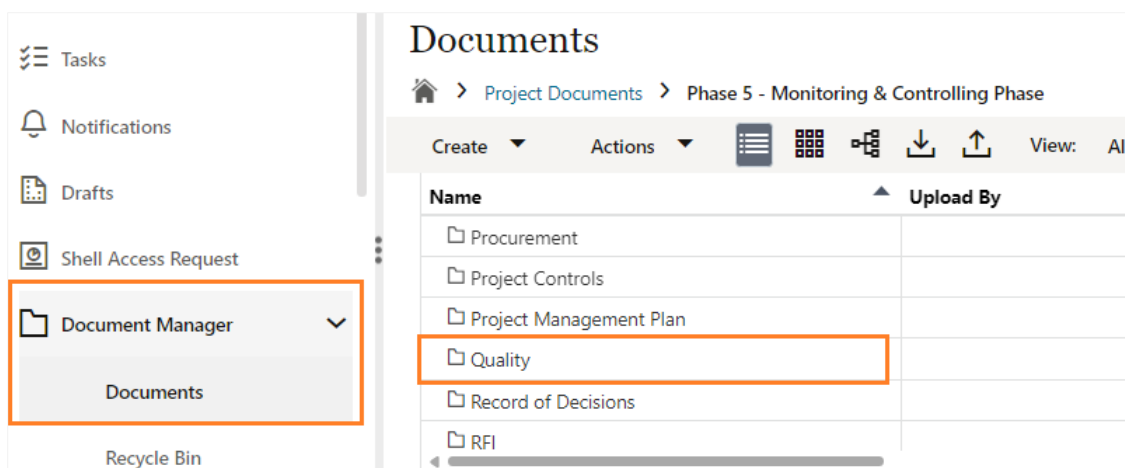
Workflow Step	Summary
Issues	NCRs can capture issues directly in the Issues BP within Unifier. These issues represent current problems that are actively affecting project progress. By linking issues from an NCR, the project team can assign action items to manage and resolve these issues promptly, preventing them from escalating into risks.
Risks	Risks identified through an NCR can be directly linked to the Risk BP by creating a Risk record from a completed NCR. This connection ensures that any non-conformances with potential future impact on the project are documented as risks. This allows the team to plan and execute appropriate mitigation actions, helping to protect the project's objectives.
Purchase Orders	NCRs may reference purchase orders, particularly when the non-conformance involves product specifications, quantities, delivery dates, or terms. Conversely, the findings from an NCR may necessitate updates or adjustments to the details of a purchase order, ensuring alignment with the project's quality and compliance standards.

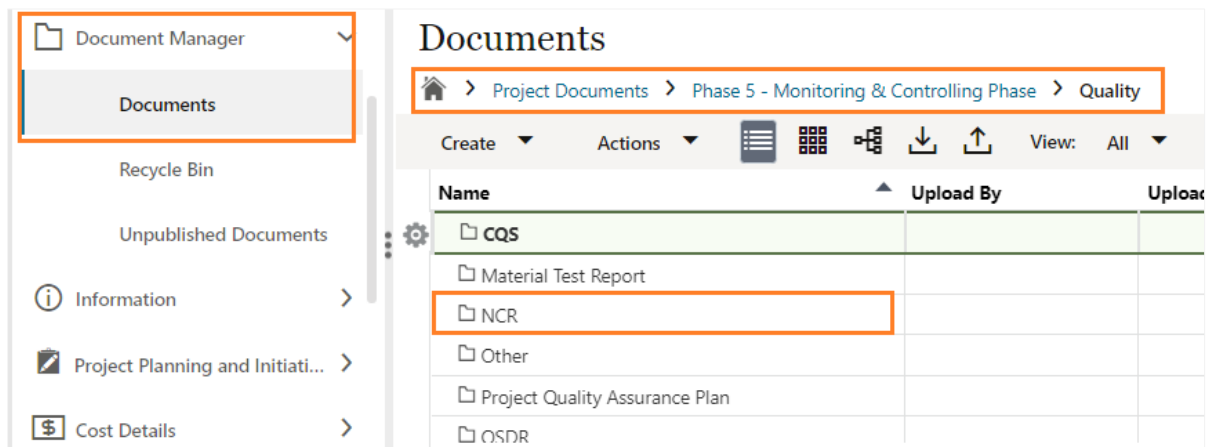
2.16 BP & Document Manager

2.16.1 Non-Safety

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 >Quality> NCR.**





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.

Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Quality > NCR

Name	Upload By	Upload Date	Location	BP	Document URL
Upper form test.pdf	Company Administrator	04/30/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386381
UAT Test File.pdf	Soumitra Mandal - All Pr...	06/13/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387766
Nonconformance Report_NCR-000054_Non safe...	Srihariprasath Bharathi- ...	06/13/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387734
Nonconformance Report_NCR-000039_Test pdf...	Company Administrator	04/30/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386383
Nonconformance Report_NCR-000019_dbvf.pdf	Rashmi Singh-Project M...	01/18/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29301
Nonconformance Report_NCR-000013_Non_Safe...	Company Administrator	12/15/2023 09:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29111
Nonconformance Report_NCR-000011_sgsg.pdf	Company Administrator	12/15/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29101

Any files that are attached to the workflow will include the **paper clip icon** in the “BP” column. If a file was uploaded directly to the Document Manager folder, there will not be a paper clip icon in the “BP” column.

Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Quality > NCR

Name	Upload By	Upload Date	Location	BP	Document URL
Upper form test.pdf	Company Administrator	04/30/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386381
UAT Test File.pdf	Soumitra Mandal - All Pr...	06/13/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387766
Nonconformance Report_NCR-000054_Non safe...	Srihariprasath Bharathi- ...	06/13/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387734
Nonconformance Report_NCR-000039_Test pdf...	Company Administrator	04/30/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22386383
Nonconformance Report_NCR-000019_dbvf.pdf	Rashmi Singh-Project M...	01/18/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29301
Nonconformance Report_NCR-000013_Non_Safe...	Company Administrator	12/15/2023 09:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29111
Nonconformance Report_NCR-000011_sgsg.pdf	Company Administrator	12/15/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29101

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

Home > Project Documents > Phase 5 - Monitoring & Controlling Phase > Quality > NCR

Name	Upload By	Upload Date	Location	BP	Document URL
Nonconformance Report_NCR-000054_Non safe...	Sort Ascending	/13/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387734
UAT Test File.pdf	Sort Descending	/13/2024 05:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387766
Nonconformance Report_NCR-000019_dbvf.pdf	Columns	/18/2024 02:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/29301
Action Items_AI-000005_AI-01.pdf	Lock after this Column	/14/2023 06:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/28989
MRF-000001.pdf		/28/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/29936
Nonconformance Report_NCR-000008_Test.pdf...		/14/2023 06:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/28991
Nonconformance Report_NCR-000011_enact.pdf	Company Administrator	12/15/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...	⊗	https://dv-unifier.southernco.com/unifier/link/dm/file/download/29101

2.16.2 Safety

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 recorded 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 **Navigators**, click **Document Manager**.
2. Click **Documents**.
3. In the central pane, navigate to the following folder:
 - a. **Phase 5 - Monitoring & Controlling Phase > Safety > NCR(Safety).**

The screenshot shows the Document Manager interface. On the left, the 'Document Manager' folder is selected in the sidebar, and the 'Documents' sub-folder is highlighted. The main pane displays a list of documents under the 'Phase 5 - Monitoring & Controlling Phase' folder. The 'Safety' folder is selected, and its contents are visible in the list below.

The screenshot shows the Document Manager interface with the 'Safety' folder selected. The breadcrumb path at the top reads 'Project Documents > Phase 5 - Monitoring & Controlling Phase > Safety'. The document list below shows 'NCR (Safety)' as the selected document.

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.



Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Safety > NCR (Safety)

Create	Actions	View: (Modified) All							
Name	Upload By	Upload Date	Location	BP	Document URL				
Nonconformance Report_NCR-000053_Safet...	Srihariprasath Bharath...	06/13/2024 0...	/Phase 5 - Monitoring & Controlling Ph...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387755				
Action Items_AI-000005_AI-01.pdf	Company Administrator	12/14/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29009				
Cost & Portfolio Solutions.pptx	Company Administrator	12/15/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29099				
MRF-000001.pdf	Company Administrator	02/28/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29939				

Any files that are attached to the workflow will include the **paper clip icon** in the “BP” column. If a file was uploaded directly to the Document Manager folder, there will not be a paper clip icon in the “BP” column.

Documents

Project Documents > Phase 5 - Monitoring & Controlling Phase > Safety > NCR (Safety)

Create	Actions	View: (Modified) All							
Name	Upload By	Upload Date	Location	BP	Document URL				
Nonconformance Report_NCR-000053_Safet...	Srihariprasath Bharath...	06/13/2024 0...	/Phase 5 - Monitoring & Controlling Ph...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/22387755				
Action Items_AI-000005_AI-01.pdf	Company Administrator	12/14/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29009				
Cost & Portfolio Solutions.pptx	Company Administrator	12/15/2023 07:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29099				
MRF-000001.pdf	Company Administrator	02/28/2024 06:...	/Phase 5 - Monitoring & Controlling Phase...		https://dv-unifier.southernco.com/unifier/link/dm/file/download/29939				

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).

Create Actions View: (Modified) All

Name	Upload By	Upload Date	Location
Nonconformance Report_NCR-000053_Safety.pdf	Sort Ascending	/13/2024 03:...	/Phase 5 - Monitoring & Cont
Action Items_AI-000005_AI-01.pdf	Sort Descending	/14/2023 07:...	/Phase 5 - Monitoring & Cont
Cost & Portfolio Solutions.pptx		/15/2023 07:...	/Phase 5 - Monitoring & Cont
MRF-000001.pdf		/28/2024 06:...	/Phase 5 - Monitoring & Cont

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.

Back Charge Authorization	A formal document generated as a result of an NCR that authorizes a chargeback to a contractor or supplier for rework or repairs.
Contractual Change Order	An official change to the contract, often generated due to an NCR, modifies the scope, cost, or schedule of the project.
Technical Review	A specific step in the NCR process where a qualified engineer or technical expert reviews the nonconformance to determine the appropriate corrective actions.

4.3 Abbreviations and Acronyms

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

PMO	Project Management Office
BP	Business Process
QA	Quality Assurance
NCR	Nonconformance Report



4.4 Frequently Asked Questions

1. Why is the Nonconformance Report getting stuck at the 'Recommendation' step without moving forward in the workflow?

This issue often occurs due to incomplete or incorrect data entry, or because the necessary fields have not been filled out properly. Ensure that all required fields in the 'Recommendation' section are populated correctly, including the "Recommendation for Resolution" and "Engineer/Technical Approval Required?" fields. If these fields are not filled or if there is conflicting information, the system may prevent the NCR from moving to the next step.

2. What should I do if the Nonconformance Report doesn't allow me to select the appropriate Contractor or Supplier in the "Nonconforming Party" field?

If the "Nonconforming Party" field is not allowing the correct selection, this might be due to user permission restrictions. Verify that the user has the appropriate permissions to access and select from the available options. Check whether the Contractor or Supplier has been correctly associated with the project or shell within Oracle Unifier.

3. How can I handle discrepancies between the recommended resolution and the implemented solution in an NCR?

If discrepancies arise between the recommended resolution and what has been implemented, it's crucial to document the differences and reasons for the deviation. Review the initial recommendation to ensure it was feasible and practical under the given circumstances. Engage with the team responsible for the implementation to understand why the change was made. If the deviation was necessary due to unforeseen conditions, update the NCR to reflect the actual steps taken, and ensure that the change is validated and approved by all relevant parties.

4. What should I do if an NCR is stuck at the "Technical Review" step and hasn't moved for an extended period?

First, confirm whether the reviewer assigned to the "Technical Review" step has the necessary permissions and is aware of the task. If permissions are correct and the reviewer has been notified, check for any dependencies or incomplete information that might be causing the delay. For example, missing documentation or unclear details in the NCR can halt progress. Communicate with the reviewer to determine if they need additional information or clarification.

5. How can I ensure that the correct team members are notified at each step of the NCR process?

Ensure that email notifications are configured correctly, with the appropriate individual CC'd where necessary. If notifications are not being received, check the user preferences in Unifier and confirm that the correct email addresses are associated with each user.