

SUBMITTALS

Oracle Unifier Business Process User Guide



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1. Business Process Overview

| Shell Level | Project Level |
|----------------|--|
| Workflow | Yes |
| Connected BPs | Submittals Review Risks List of Values |
| Partner Access | Yes |

1.1 Understanding Submittals

Submittals in Oracle Unifier are a way for Partner Users, such as Contractors or Vendors, to submit important project-related documents to Southern Company. These documents can be for "information only" purposes or for "review and approval." The Submittals process helps keep track of these documents throughout the entire lifecycle of a project, from the very beginning to the end.

Note: Multiple documents can be submitted at the same time; however, there are limitations. See more information under the [section 2.1 > 6](#) & [section 2.8 > 6](#)

Who can identify and manage Submittals?

- **Partner Contractors** and **Partner Engineers** can identify and manage Submittals. (Partner users can view only their own submitted records)
- If the ADAMS Integration is set up for the organization, a **Document Controller** oversees reviewing all Submittals and deciding when to send them to ADAMS.
- If ADAMS Integration is not set up, **Submittal Reviewers** are responsible for organizing the review process and closing out documents.

Examples of Submittals:

Here are some types of documents that might be submitted through this process:

- **Engineering Drawings:** These could be designing plans or "as-built" drawings that show how something was built.
- **Contractor Quality Control Documents:** These documents ensure that the work meets quality standards.
- **Contractor Quality Plans:** Plans that outline how the contractor will maintain quality.
- **Other Contract Documents:** Any other documents referenced in the contract that are important for the project.

Why is this important?

The Submittals process ensures that all necessary documents are submitted, reviewed, and approved efficiently. This helps maintain clear communication between Southern Company and its partners, ensuring that everyone is on the same page and that projects move forward smoothly.



1.2 User Groups & Permissions

| Role | Permissions | Shell Level |
|---------------------|---|---------------------|
| Partner Contractors | Authorized to initiate, act on, and receive record notifications | Project Level Shell |
| Partner Engineers | | |
| Document Controls | | |
| Submittal Reviewers | Authorized to initiate, act on, and receive Submittals record notifications. Also authorized to initiate Submittals Review records. | |
| BU Admin | Authorized to perform the one-time setup of Org. shell details. | |

1.3 Submittals Workflow Overview

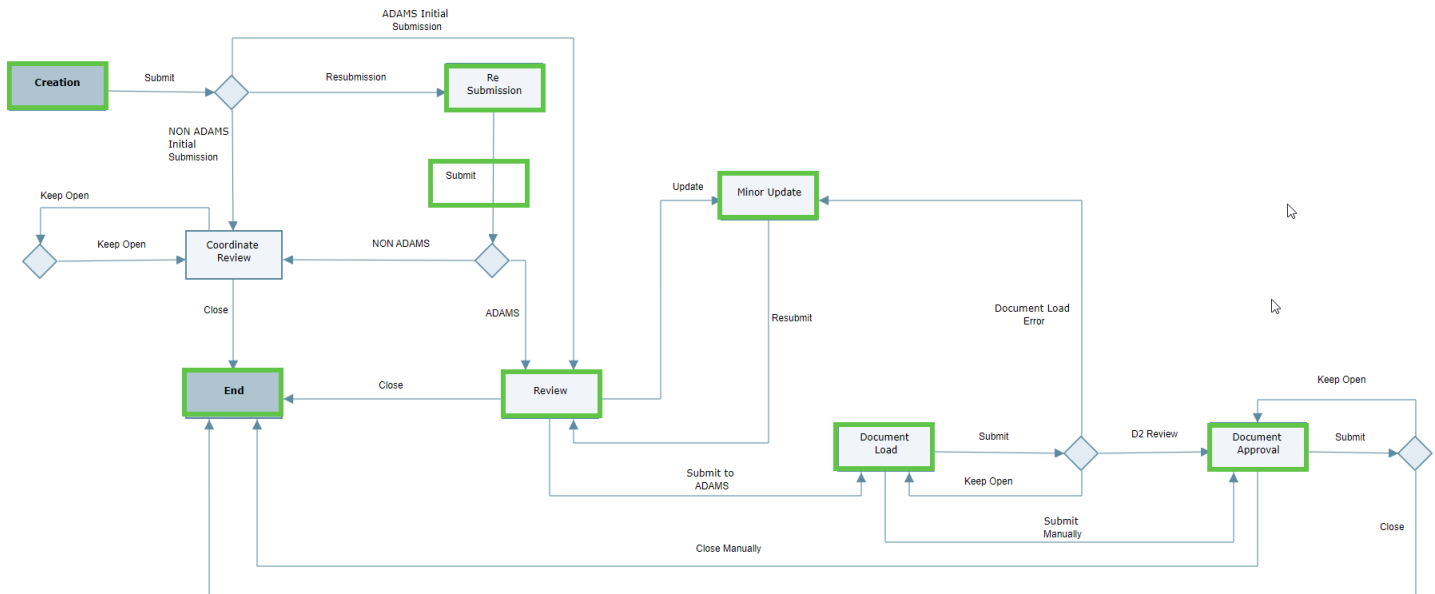
The Submittals workflow in Oracle Unifier is designed to streamline the process of submitting, reviewing, and approving project-related documents. This workflow ensures that all necessary documentation is handled efficiently and accurately throughout the project's lifecycle. There are two distinct routes within this workflow: the **ADAMS workflow** and the **non-ADAMS workflow**. The ADAMS workflow integrates with ADAMS and D2/Documentum to provide an automated, error-checked process for document management, while the non-ADAMS workflow involves manual review and coordination within Oracle Unifier. Each route offers unique advantages, catering to different project needs and organizational setups.

1.3.1 Key Differences: ADAMS vs. Non-ADAMS

- **Automation vs. Manual:** ADAMS workflow automates review and approval, while non-ADAMS relies on manual processes.
- **Integration:** ADAMS integrates with D2/Documentum for additional validation, whereas non-ADAMS is self-contained within Unifier.
- **Efficiency:** ADAMS provides a streamlined, error-checked process, reducing the need for manual handling and potential errors.



1.3.2 ADAMS Workflow



| Workflow Step | Summary |
|-------------------|--|
| Create | The initiator starts by creating submittals record with detailed information about the document that needs to be submitted. Once the record is prepared, the initiator sends the Submittal for review. |
| Review | The person responsible for the review accepts the task and evaluates the Submittal. The reviewer has several options: they can request minor updates, submit the document to ADAMS for further processing, or close the process if everything is satisfactory. |
| Minor Update | If the reviewer requests changes, the person responsible will address the feedback and make the necessary updates. After resolving all comments, the updated record is resubmitted for review. |
| Resubmission | If Submittal record gets rejected during review, user need to resubmit it. The current Submittal record will be marked as “Closed,” and user needs to create new resubmission record manually with all the details from the original submission. |
| ADAMS Integration | This step allows documents attached to a Submittal record to be sent to ADAMS, which validates the documents and initiates workflows in D2/Documentum. If the workflow in D2/Documentum is completed successfully, ADAMS will close the Unifier Submittal record. If documents are rejected, the marked-up documents will be sent back to Unifier for further action. |
| Document Load | ADAMS facilitates a document load where the documents are reviewed and validated for errors, and workflows in D2/Documentum are initiated. |
| Document Approval | The person responsible checks the submitted documents and details. If needed, they can assign approval tasks to other user groups and stakeholders. Once all necessary approvals are obtained, the record proceeds to the final stage. |
| Workflow End | The record reaches its terminal stage and becomes non-editable (except for query tabs). A PDF of the Issue record is automatically published to the Document Manager, and notifications are sent to the initiator and those who were cc'd. If the person responsible created an Action Item or Record of Decisions, these records will appear in the Submittals and their respective Business Processes. |



1.4 Submittals 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 'Create New Submittals' form. At the top, there is a title 'Create New Submittals' and three buttons: 'Save Draft', 'More Actions' (with a dropdown arrow), and 'Send'. Below the title are two tabs: 'Submittals' (active) and 'Document Details'. A line labeled 'Line Item Details' points to the 'Document Details' tab. The form is divided into several sections. The first section contains input fields for 'Record No', 'Status', 'Title *', 'Due Date *', 'Originator' (a dropdown menu with 'Company Administrator' selected), 'Creator' (a text field with 'Company Administrator'), 'Project Manager' (a text field with 'Company Administrator'), 'Creation Date', and 'Record Last Update Date'. A line labeled 'Form Fields' points to the 'Title *' and 'Due Date *' fields. Below this section are five expandable sections: 'Submittal Overview', 'Description', 'Submittal Summary', 'ADAMS Integration', and 'Record Information'. A line labeled 'Form Blocks' points to the first section containing the input fields.

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 business process through its lifecycle.
- **Submittal Overview:** Aims to identify and categorize the submittal by capturing essential details such as whether the Initiator is sending the submittal for 'Review and Approval' or for 'Information Only,' related purchase order, vendor documentation, and the contractor/vendor involved, ensuring all necessary background information is available for review.
- **Description:** Provides a space for a detailed explanation of the submittal, ensuring that the purpose, context, and specifics of the document are communicated to reviewers.
- **Submittal Summary:** Summarizes the key aspects of the submittal, including its category (new or resubmission), initial record number, the number of line items, and the status of resubmission, to give reviewers a quick overview of the submission's progress and scope.
- **ADAMS Integration:** ADAMS Integration: Tracks the document's journey through the ADAMS system by indicating integration status, the last update date, and the tracking number, ensuring that all processing steps are transparent and traceable.



- **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 creating a Submittals record. Optional fields may include additional details like secondary objectives, manufacturer information, revision numbers 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.

- **Submittals (Upper Form):** Captures high-level project information, including essential details like project manager, submittals reason, and resubmission details. This tab ensures all critical project-specific information is documented for easy reference and decision-making.
- **Document Details:** The Document Details line item in the Submittals form captures essential information about submitted documents to ensure accurate tracking and efficient review. This section records reviewer feedback, basic document identifiers (such as file ID, name, and title), specific submittal context (including department, type, and asset relation), and manufacturer details if applicable. By providing comprehensive documentation, this section facilitates seamless integration with systems like ADAMS and Documentum, ensuring thorough and transparent processing of each submittal.
- **Southern Company Review:** This tab will be used by the reviewers to review the documents submitted by the Partner contractors and Partner engineers. Reviewers can provide comments and markup attachments.
- **Submittals Review:** The Submittals Review is displayed as a query tab on the Submittals record and it is used by Non-ADAMS integrated projects. This query tab will facilitate a coordinator to initiate parallel reviews of Submittals to various project team members. The intent is to only access / use the Submittals Review through the Submittals record. The Partner Users will not have access to create a Submittals Review.
- **Risks (ADAMS WF Only):** The Risks are displayed as a query tab on the Submittals and will be used by ADAMS integrated projects. This query tab will be used to facilitate the creation of a risk. The Partner Users will not have access to create a Submittals Review.



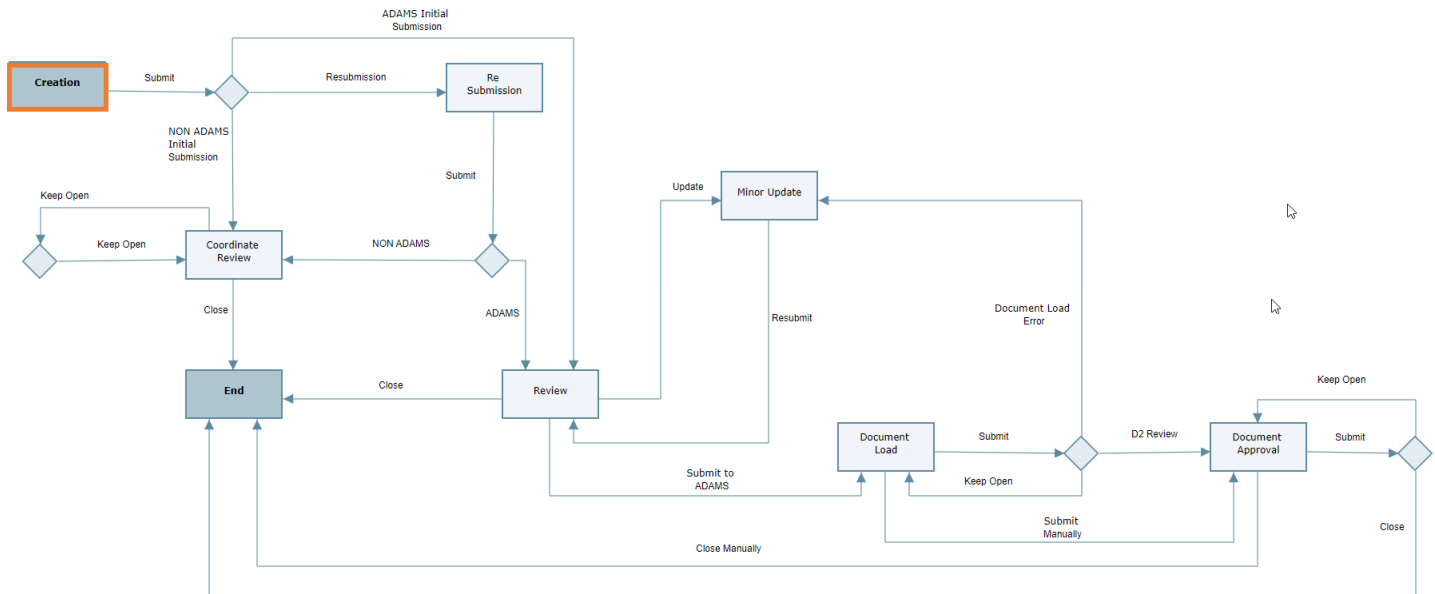
2. Step-by-Step Instructions

ADAMS Workflow

2.1 Create Submittals Record

User Role(s): Partner Contractors & Partner Engineers

Explanation: A new record is created in the system to capture all the relevant details about the documents being submitted for review.



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

⊕ Design and Constr... ▼

Correspondence

Materials Recei...

Nonconforman...

Requests for In...

Submittals

Submittals

+ Create

Actions ▼

View : All Records ▼

| ... | Record # | Status | Title | Contractor/Vendor |
|-----|------------|--------|----------------------------|-------------------|
| | SUB-000008 | Open | test 6/17 (DCN exit point) | Southern Company |
| | SUB-000007 | Open | y | Southern Company |
| | SUB-000006 | Open | ABCDEFGH | Southern Company |
| | SUB-000005 | Open | Demo 03 | |
| | SUB-000004 | Closed | Demo 03 | |



3. In the **General** section of the **Create New Submittal** window complete the following required fields.

| | |
|-----------------|--|
| Title | Use a clear and concise title that summarizes the content or purpose of the submittal. Avoid using unnecessary words to ensure the title remains within the 50-character limit. |
| Due Date | The Due Date is automatically set to 10 working days from the date the Submittal record is created. For example, if the Submittal BP is created on Jun 26, 2025, the system will automatically populate the due date as July 9, 2025. This ensures consistent timing for reviews while accounting for weekends and holidays. Note: The assigned Due Date will apply equally to all Line Items/Documents contained in the submittal |

Create New Submittals

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

Submittals Document Details

| | |
|----------------------|----------------------|
| Record No | Status |
| <input type="text"/> | <input type="text"/> |
| Title * | Due Date * |
| <input type="text"/> | 07/09/2024 10:20 PM |
| Required | |

4. Navigate to the **Submittal Overview** Section and select the **Submittal Reason** from the dropdown Menu. If the documents require approval, then select the option “**For Review and Approval.**” If the documents do not need approvals and it is for information only, then select the option “**For Information only.**”

Submittal Reason

Select the most appropriate reason from the dropdown that accurately reflects the purpose of the submittal. The reason you choose will help categorize the document and guide the reviewers in understanding its context. Ensure that the reason aligns with the content of the document being submitted.

Note: The assigned ‘Submittal Reason’ will apply equally to all Line Items/Documents contained in the submittal

PO

Enter PO number in 250 or fewer characters. This field captures the unique identifier for the Purchase Order (PO) associated with the submittal ensuring accurate tracking and management of procurement activities.

Note: This text field will be filled by the vendor and text field is only applicable to TSS. For GAS this text PO# field is not applicable. GAS users PO# field will be read only and they will not be able to add text in this field.

▼ Submittal Overview

Submittal Reason * ?

Select

Required

PO # *

Required



5. In the **Description** block, complete the following required field.

Description

Utilize the description field to provide a thorough explanation of the submittal, ensuring clarity and completeness within the 4000-character limit. Include all necessary details to give reviewers a comprehensive understanding of the document's purpose, content, and any critical context.

Note: The Description is intended to describe the submittal as a whole. You will have an opportunity to assign a title to each Line Item submitted (see the [section 2.1 > 6](#) & [section 2.8 > 6](#) pertaining to adding Line Items.)

▼ Description

Description *

Note: In the ADAMS Integration section, integration details will be automatically populated based on your organization's integration status. You can verify whether ADAMS integration is enabled for your organization.

▼ ADAMS Integration

ADAMS Integration

Yes

6. In the **Document Details Line Item** tab, Click on **Add** & select the **Line Item**.

Note: Users should use **only Line Item** option as folder structure is already defined and manual folder creation is not needed.

Submittals

Document Details

Add ▼

Actions ▼

View Comments by:

All



Folder

Line Item



File ID

Title

Document #

Revision



7. In Line-Item Details > General Section, complete the following fields.

Name

Upload the document by clicking on the **paper clip icon**. Click browse if you want to upload the document from your local device or click “Document Manager” to select a document from Unifier document manager. **The name** of the document will be automatically fetched in the text field.

Name *

Title * ?

Browse...

Document Manager...

Title

Provide a concise and descriptive title for the line item that identifies the document or item being submitted. Use keywords that will help reviewers quickly understand the subject or focus of the document. (250 or fewer characters)

Document #

This field allows the user to enter the document number (if applicable). Ensure the correct document number is provided in this field. (250 or fewer characters)

Revision #

Enter the revision number of the document. This helps reviewers quickly identify revision of the document. (250 or fewer characters)

Sheet #

Enter the sheet number or details, specifying the exact part of the document set or drawing that this line item refers to. This helps with accurate tracking and review of specific sections. (250 or fewer characters)

**Vendor
Revision Date**

Enter the date when the vendor made the latest revision to the document. This date should reflect the most recent update provided by the vendor, ensuring that the timeline of changes is clear to reviewers.

Line Item Details

Title * ?

Document # *

Revision # *

Sheet # *

VDSS Item #

Vendors Revision Date *

MM/DD/YYYY

Required

Required

Required

Required

Required

Required



8. In the **Submittal Details** Section, select **Discipline/ Department** of the document by clicking on the icon.

**Discipline/
Department**


Select or enter the specific discipline or department that the document pertains to. This helps categorize the document appropriately and ensures it reaches the relevant reviewers.

**If Other
Discipline/
Department
Impacted**

This field is used to specify the discipline or department relevant to the document when “**Other**” is selected in the **Discipline/Department** field. This helps categorize the document appropriately and ensures it reaches the relevant reviewers.

▼ **Submittal Details**

Discipline / Department *

Type a Option Name...  Required

If Other Discipline/Department Impacted

9. Once all the Line-Item details are updated, click on either **Save** or **Save & Add New** button.

Save

Select this option when only one line item to be added.






**Save & Add
New**

Select this option when you need to add multiple line items. Repeat steps 6 to 9 for each additional line item.

Manufacturer Revision #

Cancel **Save** **Save & Add New**

10. Uploaded documents with multiple line items can be viewed and edited under the Document Details tab.

| Submittals | | Document Details | | | | | |
|---|-----------|-------------------------|------------|---|------------|---------|--|
| Add ▼ | Actions ▼ | View Comments by: All ▼ | |  | | | |
| Name | | File ID | Title | Document # | Revision # | Sheet # | |
| Attachments | | | | | | | |
|  Document 3.docx | | | Document 3 | | | | |
|  Document 2.pptx | | | Document 2 | | | | |
|  Document 1.pptx | | | Document 1 | | | | |
|  Document 4.docx | | | Document 4 | | | | |



11. Now click on the **Send** button on the top right side of the screen.

The screenshot shows the 'Create New Submittals' interface. At the top, there's a title 'Create New Submittals' and three buttons: 'Save Draft', 'More Actions' (with a dropdown arrow), and 'Send' (highlighted with an orange border). Below the title, there are two tabs: 'Submittals' and 'Document Details'. Under the 'Submittals' tab, there are three buttons: 'Add' (with a dropdown arrow), 'Actions' (with a dropdown arrow), and 'View Comments'.

- Under **Workflow Action Details > Workflow Actions** select the **Submit** option from the dropdown menu.
- Click on **the Send** button available at the bottom of the **Workflow Action Details** window. The record will be created and sent for review.

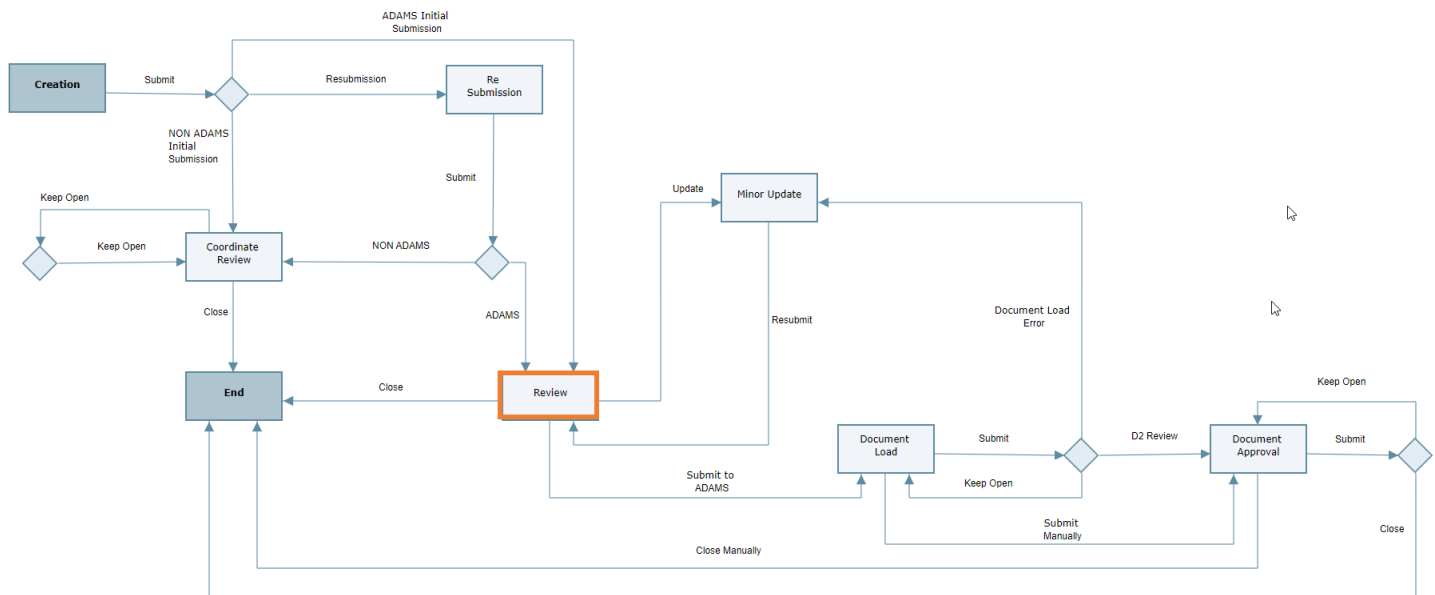
The screenshot shows the 'Workflow Action Details' modal window. It has a title bar with a close button (X). The main content is divided into two sections: 'Action Details' and 'Due Date Details'. In the 'Action Details' section, there's a dropdown menu labeled 'Workflow Actions' (highlighted with an orange border) with 'Submit' selected. To the right of this dropdown, it says 'Send For Review'. Below this, there's a 'To' field with the text 'Company Administrator; Document Controls'. In the 'Due Date Details' section, there's a 'Task Due Date' field. At the bottom right, there are two buttons: 'Cancel' and 'Send' (highlighted with an orange border). There is also an information icon (i) in the center of the modal.



2.2 Review Submittals Record

User Role(s): Document Controls

Explanation: The submitted document is reviewed by designated individuals to check for completeness, accuracy, and compliance with requirements.



1. Click the **Tasks** option in the **Navigator**.
 - a. The Task Log will show available records.
 - b. Double-click the **Submittals** record to be Reviewed.

The screenshot shows the 'Tasks' page in the application. On the left, the 'Tasks' option is highlighted in the Navigator. The main area displays a table of tasks. The first row is highlighted with a red box, showing a task for 'Project_Demo_TSS' with the business process 'Submittals' and record number 'SUB-000009'.

| Origin | Business Process | Record Number | Title |
|------------------|------------------|---------------|-------------|
| Project_Demo_TSS | Submittals | SUB-000009 | Test_270624 |

2. The Submittals form opens. In the top right corner of the form, click **Accept**.

The screenshot shows the 'Submittals' form. In the top right corner, the 'Accept' button is highlighted with a red box. The form also shows a 'Task Details' section with the text 'From Hariharanath Maganti- Partner Contractor'.



3. Navigate to the **Submittal Overview** section and select **Oracle PO #** from the given select function.
Note: For TSS, Select the PO referred by the vendor in the **Submittals Overview> PO#** text field.

Oracle PO # *

Type a Oracle PO #...

Required

4. Carefully review all the details in the record and attached document. To review the document, navigate to the **Document Details** tab, click on the document to see the preview.

Submittals **Document Details** Southern Company Review Risks

Actions View Comments by: All

Download Refresh Print Search Filter

| Name | File ID | Title | Document # | Revision |
|-----------------|---------|------------|------------|----------|
| Attachments | 0001 | | | |
| Document 1.pptx | 0002 | Document 1 | A-1 | V1 |
| Document 2.pptx | 0003 | Document 2 | A-2 | V1 |
| Document 3.docx | 0004 | Document 3 | A-3 | V1 |
| Document 4.docx | 0005 | Document 4 | A-4 | V1 |

Line Item Details Attachments

Review Results
Review Results

General
Encrypted or password protected
There is no way for Unifire

- a. The preview window will open. You can also download the document by clicking on download button.

Attachments : Document 1.pptx

Download

| Publi... | Name | Pub. No. | Tab Name |
|-------------------------------------|-----------------|----------|-----------------|
| <input checked="" type="checkbox"/> | Document 1.pptx | | Document Det... |
| <input checked="" type="checkbox"/> | Document 2.pptx | | Document Det... |
| <input checked="" type="checkbox"/> | Document 3.docx | | Document Det... |
| <input checked="" type="checkbox"/> | Document 4.docx | | Document Det... |
| <input checked="" type="checkbox"/> | Document 2.pptx | | Southern Com... |
| <input checked="" type="checkbox"/> | Document 3.docx | | Southern Com... |
| <input checked="" type="checkbox"/> | Document 4.docx | | Southern Com... |
| <input checked="" type="checkbox"/> | Document 1.pptx | | Southern Com... |

Content

5. Once all line items are reviewed, determine the next actions from the points below.

| If the attachment/ record needs minor update | If the attachment/ record needs to be sent for ADAMS Review | If the record needs to be terminated |
|---|--|--|
| 1. Send the record back to initiator by using steps in section 2.2.1 Send the Record for Minor Update | 2. Send the record to ADAMS by using steps in section 2.2.2 Send Record to ADAMS | 3. Close the current record by using steps in 2.2.3 Close the Record |



2.2.1 Send the Record for Minor Update

1. Navigate to the **Southern Company Review** tab and select the line item which needs minor update. Under **Review Status** Section and populate the below mention field.

Reviewer Notes/Comments

Utilize this field to provide a thorough explanation of the minor update required, ensuring clarity and completeness within the 4000-character limit. Include all necessary details to give initiator a comprehensive understanding of the required changes, and any critical context.

The screenshot shows the 'Submittals' interface with the 'Southern Company Review' tab selected. The 'Review Status' section is expanded, and the 'Reviewer Notes/Comments' field is highlighted with a red box. The table below lists the documents being reviewed.

| No. | File ID | Name | Title | Docum |
|-----|---------|-----------------|------------|-------|
| 004 | | Document 1.pptx | Document 1 | A-1 |
| 003 | | Document 4.docx | Document 4 | A-4 |
| 002 | | Document 3.docx | Document 3 | A-3 |
| 001 | | Document 2.pptx | Document 2 | A-2 |

2. Click **Save**.

The screenshot shows the 'ADAMS Integration' dialog box. The 'Save' button is highlighted with a red box.

3. Repeat Step 1 and Step 2 for multiple line items.
4. Click **Send** on the top right side of the screen.

The screenshot shows the bottom right corner of the Submittals interface. The 'Send' button is highlighted with a red box.



- Under **Workflow Actions Details** window > **Workflow Actions**, select **Update** from given drop down menu.

The screenshot shows the 'Workflow Action Details' window. Under the 'Action Details' section, there is a 'Workflow Actions' dropdown menu with a red asterisk. The dropdown is open, showing options: 'Select', 'Update' (highlighted with a red box), 'Submit to ADAMS', and 'Close'. To the right of the dropdown is the text 'Send For'. At the bottom right are 'Cancel' and 'Send' buttons.

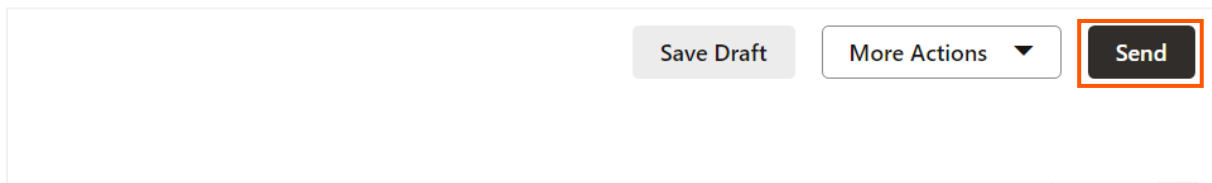
- Click **Send**. The record will be directed towards Minor Updates of the Submittals record.

The screenshot shows the 'Workflow Action Details' window after the 'Update' action. The 'Workflow Actions' dropdown now displays 'Update'. To the right, the text 'Send For' has changed to 'Minor Update'. Below the dropdown, the text 'To' is followed by 'Hariharanath Maganti- Partner Contractor'. At the bottom right, the 'Send' button is highlighted with a red box, while the 'Cancel' button remains unhighlighted.

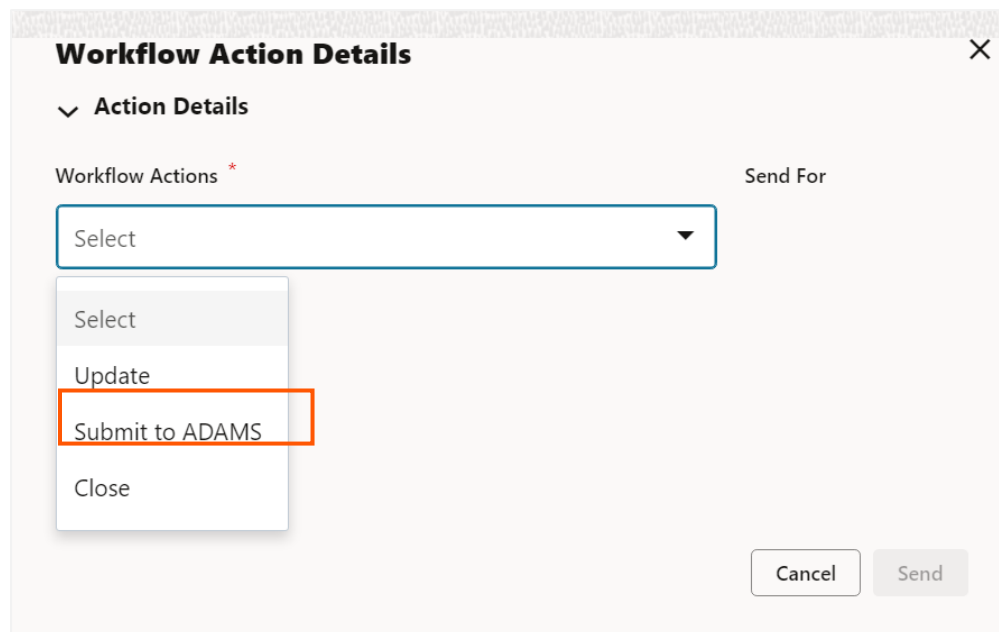


2.2.2 Send the Record to ADAMS

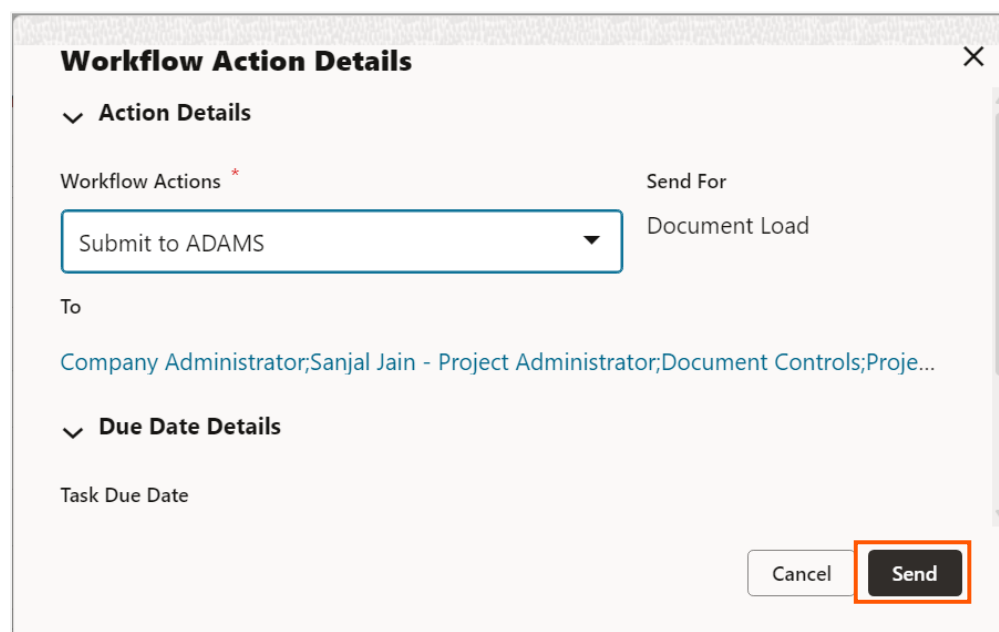
1. Click **Send** on the top right side of the screen.



2. Under **Workflow Actions Details** window > **Workflow Actions**, select **Submit to ADAMS** from given drop down menu.



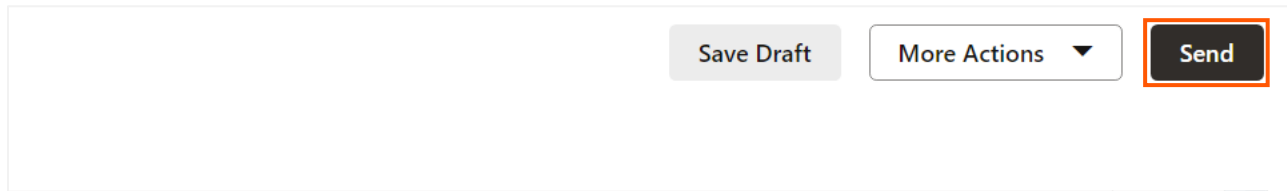
3. Click **Send**.





2.2.3 Close the Record

1. Click **Send** on the top right side of the screen.





2. Under **Workflow Actions Details** window > **Workflow Actions**, select **Close** from given drop down menu.

The screenshot shows a window titled "Workflow Action Details" with a close button (X) in the top right corner. Under the "Action Details" section, there is a label "Workflow Actions *" and a "Send For" label. Below the label is a dropdown menu currently showing "Select". The dropdown menu is open, displaying the following options: "Select", "Update", "Submit to ADAMS", and "Close". The "Close" option is highlighted with an orange border. At the bottom right of the window are two buttons: "Cancel" and "Send".

3. Click **Send**. The record will be closed.

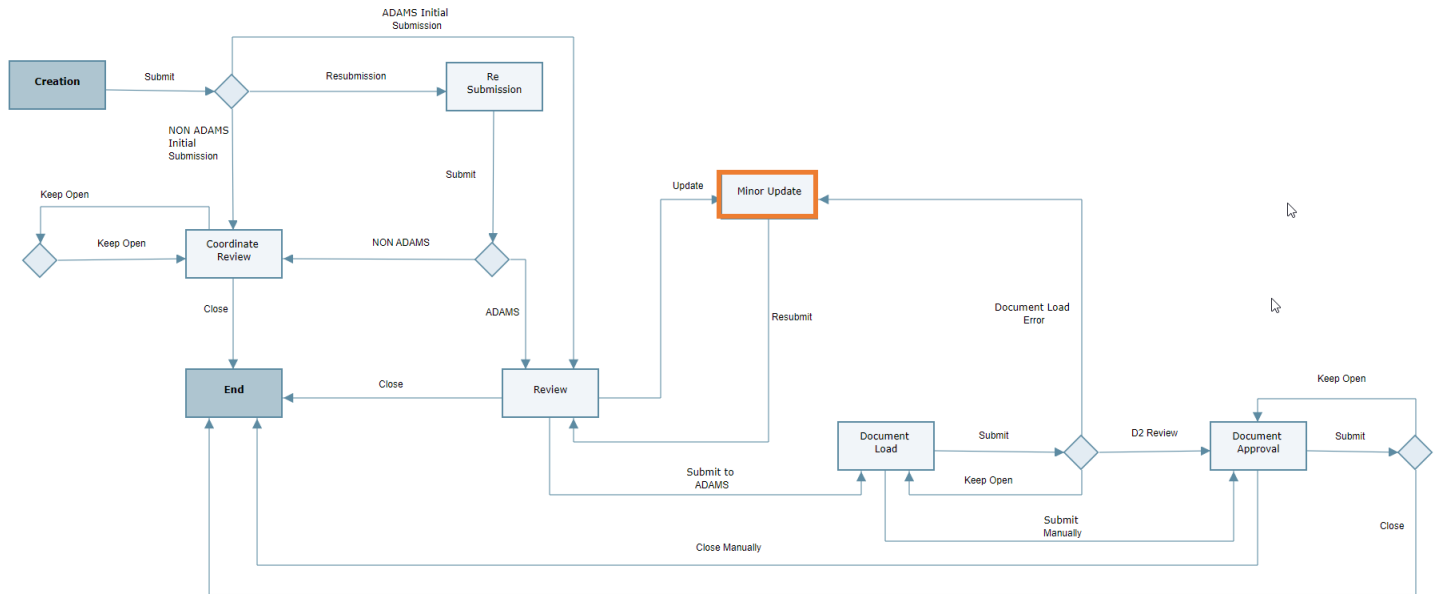
The screenshot shows the same "Workflow Action Details" window. The dropdown menu now displays "Close" as the selected option. The "Send For" label now reads "End". The "Send" button at the bottom right is highlighted with an orange border, indicating it should be clicked.



2.3 Minor Update of Submittals Record (ADAMS)

User Role(s): Partner Contractors & Project Engineers

Explanation: Small corrections or updates are made to the document based on feedback to ensure it meets all standards before final approval.



1. Click the **Tasks** option in the **Navigator**.
 - a. The Task Log will show available records.
 - b. Double-click the **Submittals** record to be Reviewed.

| Origin | Business Process | Record Number | Title |
|------------------|------------------|---------------|-------------|
| Project_Demo_TSS | Submittals | SUB-000009 | Test_270624 |

2. The Submittals form opens. In the top right corner of the form, click **Accept**.



3. In **Document Details** click on the line item > **Line-Item Details** > Correct the requested document attributes or update the form details based on instructions provided by the Reviewer or remarks updated through an integration message from ADAMS.
 - a. Once all the requested changes have been completed, then click **Save**.

The screenshot shows the 'Document Details' form with the 'Line Item Details' tab selected. The form contains a table with columns 'Name', 'File ID', and 'Title'. The first row is 'Attachments' with File ID '0001'. The second row is 'Test Document...' with File ID '0002' and Title 'test document'. To the right of the table, there are input fields for 'Title' (containing 'test document') and 'Document #' (containing '12'). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

- b. Click **Send**

The screenshot shows the 'Submittals' form with the 'Document Details' tab selected. The form contains a table with columns 'Name', 'File ID', and 'Title'. The first row is 'Attachments' with File ID '0001'. To the right of the table, there are buttons for 'Save Draft', 'More Actions', and 'Send'. The 'Send' button is highlighted by a red box.

- c. In **Actions Details** > **Workflow Actions** select **Resubmit** from the drop-down menu. Again, click on **Send**.

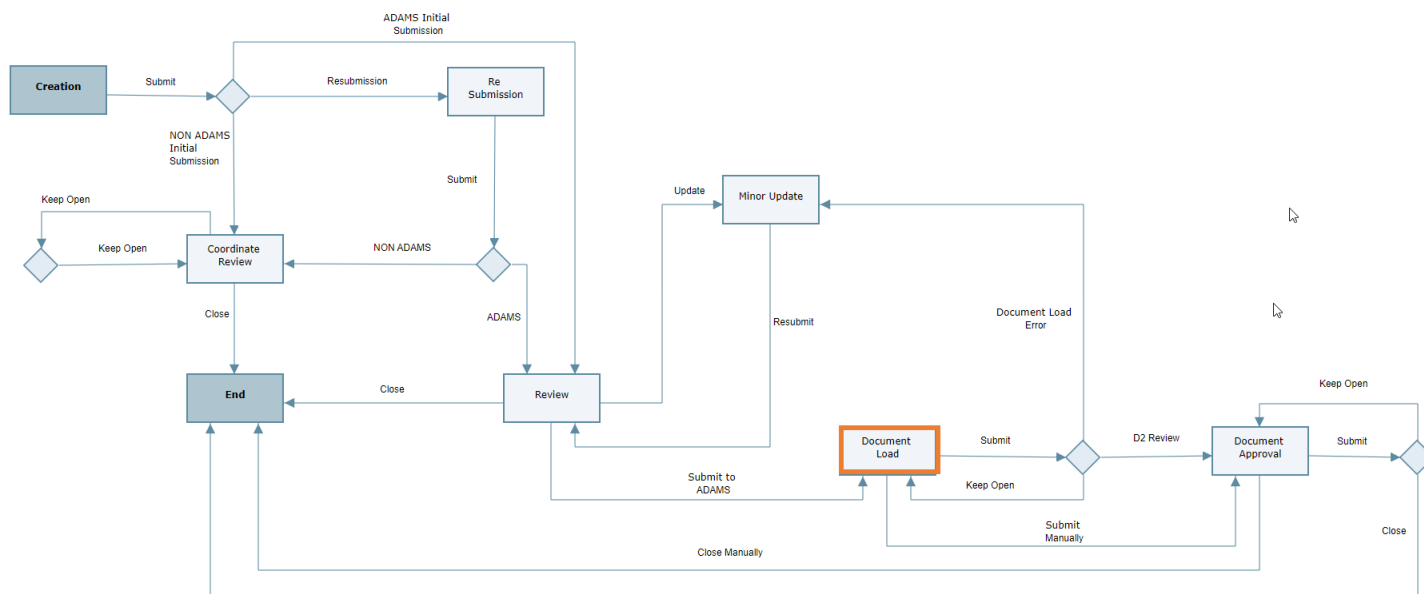
The screenshot shows the 'Workflow Action Details' form. It has a section titled 'Action Details' with a dropdown menu labeled 'Workflow Actions' containing the value 'Resubmit'. The dropdown is highlighted by a red box. To the right of the dropdown, there is a button labeled 'Send For Review'.



2.4 Document Load (ADAMS)

User Role(s): ADAMS

Explanation: In this step, the document is processed through ADAMS, where it undergoes validation to check for errors and ensure compliance with standards. Users can view comments provided by the integration during this phase. The ADAMS integration receives the new batch of documents and runs them through a document load to verify if records have already been created in Documentum/D2.



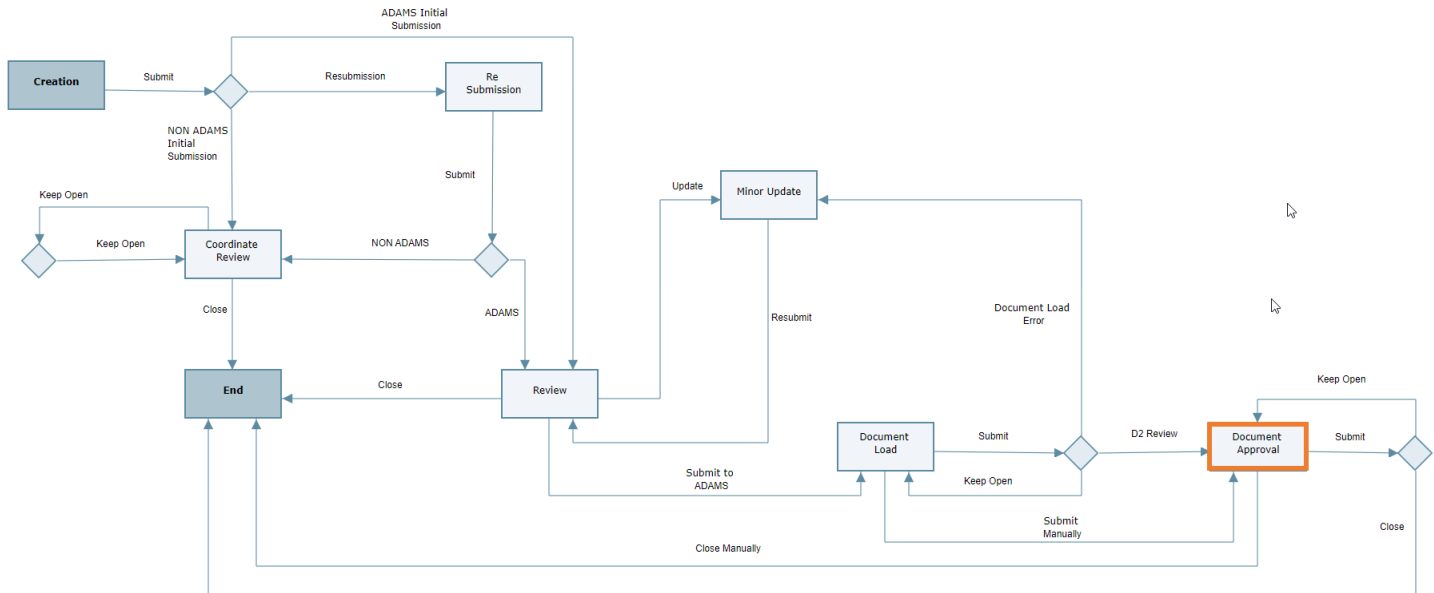
| Submit | Submit Manually |
|--|---|
| <ul style="list-style-type: none">▪ Keep Open: The document remains open if the document load is not yet complete.▪ D2 Review: If the document load is successful, the record moves forward to the document approval step.▪ Document Load Error: If there is an error during the document load, the workflow is routed back to the initiator for minor updates. | <ul style="list-style-type: none">▪ The integration allows for manual submission, enabling the record to advance to the document approval step when initiated manually. |



2.5 Document Approval (ADAMS)

User Role(s): ADAMS

Explanation: Final approval is obtained after all reviews and corrections, indicating the document is ready for official use or any resubmission is required.

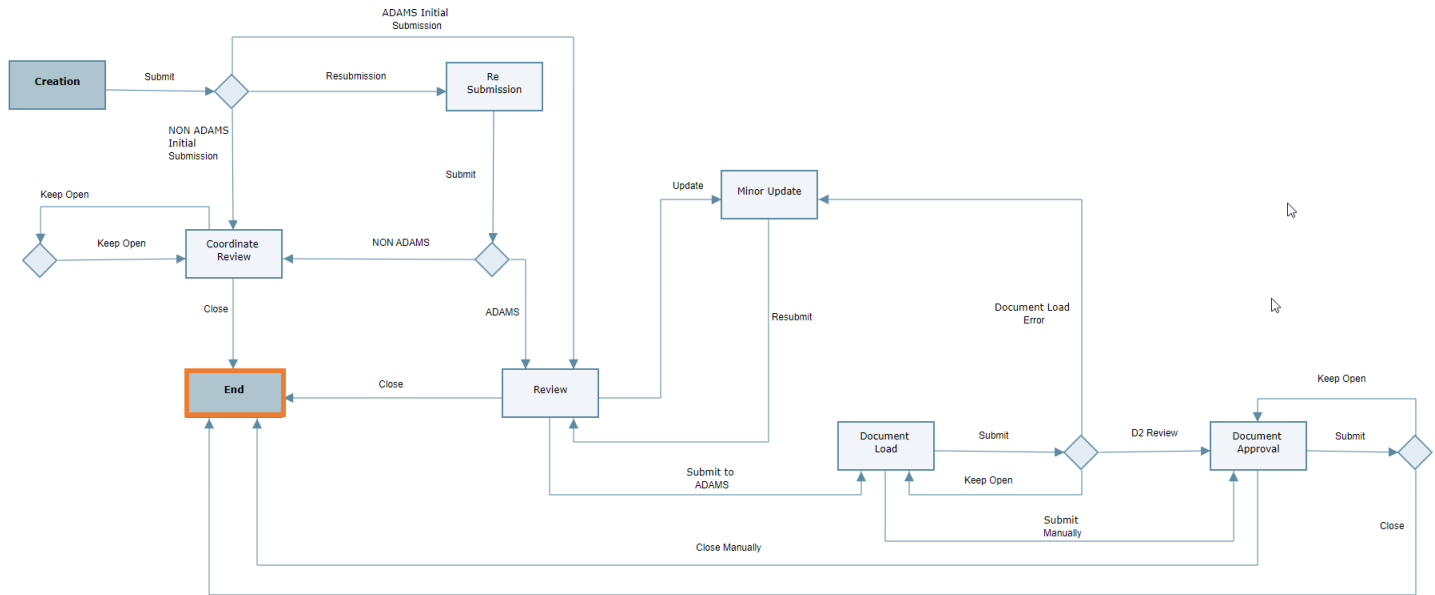


| Close Manually | Submit |
|---|--|
| <ul style="list-style-type: none">The integration allows for manual submission, enabling the record to advance to the end step. | <ul style="list-style-type: none">Keep Open: If approval is still in progress for any line item, then record will stay in keep open state.Close: After approval of each line item, and the review status of the documents are updated, (The rejected documents are sent back to Unifier) then record is closed. |

Note: Documents from ADAMS that require **Resubmission** are sent back to Unifier. In case of Resubmission, the Status of the current Submittal record will be changed to Closed. The initiator has to do manual submission of a new Submittals Record.



2.6 Closure Process Explained



ADAMS Workflow

- **Duplicate or Unnecessary Record:** If Document Controls identifies a submittal record as a duplicate or no longer needed, it will be closed during the [Review stage](#) to prevent further processing.
- **Resubmission Process:** If a resubmission is required, the current Submittal record will be closed, and a new record will be automatically created. The initiator will be assigned the task of [resubmission](#). Additionally, a 'Southern Company to Vendor' section will be visible, with line items auto generated from the ADAMS integration.
- **Approval and Closure in ADAMS:** The Document Approver will review and approve the Submittal in ADAMS, after which the record will be closed, marking the completion of the process.
- **Manual Closure:** The Document Approver has the option to manually close the record once all requirements have been satisfied, ensuring that the process is completed only when all conditions are met.



2.7 Related Business Processes

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

| Business Process | Summary |
|-------------------|--|
| Submittals Review | The Submittals Review Business Process (BP) is accessible as a query tab within the Submittals BP for projects not integrated with ADAMS. This query tab allows coordinators to initiate parallel reviews by various project team members, streamlining the feedback process. The Submittals Review BP is intended to be accessed exclusively through the Submittals record, and Partner Users do not have permission to create a Submittals Review independently. |
| Risks | For ADAMS-integrated projects, the Risks BP is available as a query tab within the Submittals BP. This tab is used to facilitate the creation of risks associated with the project. Similar to the Submittals Review, Partner Users do not have access to independently create a Risk. |
| List Values of | The List of Values BP supports dynamic behavior and value filtering across multiple business processes. Specifically for Submittals, it helps filter values within the 'Submittals Type' field based on selections made in the 'Discipline / Department' field. Additionally, it assists in presenting relevant options in the 'Review Status' field, enhancing the user experience by providing tailored choices based on the context of the submission. |

2.8 Integration Explained

The ADAMS integration in Oracle Unifier streamlines the document management workflow through a series of automated steps designed to enhance efficiency and accuracy.

2.8.1 How it Works

The system involves both inbound and outbound integration between Oracle Unifier and Documentum through ADAMS. ADAMS acts as the middleware, handling document validation, revision, and workflow initiation in D2/Documentum.

When you are managing a project, you often need to submit important documents for review and approval. Oracle Unifier helps streamline this process by using a system called Submittals. Here is how it works:

- 1. Submit Your Documents:** Contractors can submit documents through Oracle Unifier. This could include things like engineering drawings, quality control documents, or any other project-related files.
- 2. Behind-the-Scenes Processing:** Once submitted, your documents are sent to a system called ADAMS. Think of ADAMS as a helpful assistant that checks your documents to make sure they are correct and complete.
- 3. Review and Validation:** ADAMS works with another system called Documentum to thoroughly review your documents. If there are any issues, they get flagged for revision. This ensures that only the most accurate and approved documents move forward.
- 4. Automated Workflows:** ADAMS automates many of the tasks involved in reviewing and approving documents, saving time, and reducing errors. This means less manual work for you and faster processing of your submissions.
- 5. Feedback and Updates:** If your documents need changes, you will get feedback with specific markups. You can then make the necessary updates and resubmit them.
- 6. Final Approval:** Once your documents are validated and approved, they are returned to Oracle Unifier, ready for the next steps in your project.



2.8.2 Data Sources

Oracle Unifier and Documentum serve as primary data sources, facilitating document storage, retrieval, and workflow management.

2.8.3 Middleware Explained

Middleware is like a bridge or a translator between different software applications, allowing them to communicate with each other effectively. In this context, ADAMS serves as middleware, enabling Oracle Unifier and Documentum to exchange information smoothly. This ensures that documents submitted by contractors are processed correctly, validated, and approved through automated workflows.

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

The screenshot shows the Document Manager interface. On the left, the 'Documents' tab is selected. The main pane displays a list of folders: Safety, Schedule, and Submittals. The 'Submittals' folder is highlighted. The breadcrumb path at the top is: Project Documents > Phase 5 - Monitoring & Controlling Phase > Submittals.

| Name | Upload By | Upload Date | Location |
|------------|-----------|-------------|------------------|
| Safety | | | /Phase 5 - Monit |
| Schedule | | | /Phase 5 - Monit |
| Submittals | | | /Phase 5 - Monit |

- a. **Submittals > Discipline / Department**

The screenshot shows the Document Manager interface with the 'Submittals' folder selected. The main pane displays a list of folders: Construction, Corrosion, Material, Other, PDF Record Copy, Permitting, and Safety. The 'Construction' folder is highlighted. The breadcrumb path at the top is: Project Documents > Phase 5 - Monitoring & Controlling Phase > Submittals. On the right, the 'Other' category is selected in the sidebar.

| Name | Upload By | Upload Date | Location |
|-----------------|-----------|-------------|------------------------------------|
| Construction | | | /Phase 5 - Monitoring & Controllir |
| Corrosion | | | /Phase 5 - Monitoring & Controllir |
| Material | | | /Phase 5 - Monitoring & Controllir |
| Other | | | /Phase 5 - Monitoring & Controllir |
| PDF Record Copy | | | /Phase 5 - Monitoring & Controllir |
| Permitting | | | /Phase 5 - Monitoring & Controllir |
| Safety | | | /Phase 5 - Monitoring & Controllir |



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.

| Create | Actions | View: All | | | | | | | |
|-------------------------------|-----------------------|-------------------|------------------------------------|--|--|--|--|--|--|
| Name | Upload By | Upload Date | Location | | | | | | |
| Vendor Transmittals_SUB-... | Company Administrator | 04/02/2024 0... | /Phase 5 - Monitoring & Contro | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 04/03/2024 08:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 04/03/2024 09:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 06/05/2024 09:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 07/02/2024 03:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 06/28/2024 01:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | Company Administrator | 07/02/2024 03:... | /Phase 5 - Monitoring & Controllir | | | | | | |

5. Any files that were attached to the workflow will include the **paper clip icon** in the “BP” column if a the file is uploaded directly to the displayed Document Manager folder; it will not show the paper clip icon in the “BP” column.

| Create | Actions | View: All | | | | | | | |
|--------------------|-----------------------|-------------------|--|----|--|--|--|--|--|
| Name | Upload By | Upload Date | Location | BP | | | | | |
| Rejected | | | /Phase 5 - Monitoring & Controlling Ph... | | | | | | |
| Test Document.docx | Company Administrator | 07/01/2024 12:... | /Phase 5 - Monitoring & Controlling Phase... | | | | | | |

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).

| Create | Actions | View: All | | | | | | | |
|-------------------------------|-----------|----------------|------------------------------------|--|--|--|--|--|--|
| Name | Upload By | Upload Date | Location | | | | | | |
| Vendor Transmittals_SUB-00... | | 02/2024 01:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | | 03/2024 08:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | | 03/2024 09:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | | 05/2024 09:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | | 02/2024 03:... | /Phase 5 - Monitoring & Controllir | | | | | | |
| Vendor Transmittals_SUB-00... | | 28/2024 01:... | /Phase 5 - Monitoring & Controllir | | | | | | |



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.

| | |
|----------------------------|---|
| Documentum D2 | A content management system is used to review and validate documents during the submittal process. |
| Document Controller | A person responsible for managing the submission, tracking, and approval of documents within the submittal process, ensuring compliance with project standards. |

4.3 Abbreviations and Acronyms

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

| | |
|--------------|---|
| D2 | Documentum D2 |
| ADAMS | Automated Document and Attributed Moving System |



4.4 Frequently Asked Questions

1. What are Submittals and their purpose?

- Submittals are documents sent by Partner Users (such as Contractors or Vendors) to Southern Company for “information only” or for “review and approval.” They play a crucial role throughout a project’s lifecycle, from initiation to closeout.

2. Who is responsible for identifying Submittals?

- Partner Contractors or Partner Engineers are responsible for identifying submittals. If ADAMS Integration is enabled, a document controller reviews all submittals. If not, Submittal Reviewers coordinate reviews and document closure.

3. What types of documents are submitted through Submittals?

- Examples include engineering drawings (design and as-builts), contractor quality control documents, contractor quality plans, and all other documents referenced in the contract.

4. What permissions do different user roles have regarding Submittals?

- Partner Contractors and Partner Engineers can initiate and act on records and receive task notifications. Document Controls can initiate, edit, act on records, and receive task notifications. Submittal Reviewers can initiate and act on records, receive task notifications, and initiate Submittals Review records. Admin - Org can set up organization shell details.

5. What is the workflow process for Submittals with ADAMS Integration enabled?

- The workflow includes creating the issue record, reviewing the submittal, making minor updates, resubmission, ADAMS integration, document load, document approval, and reaching the end stage.

6. What should be included in the Submittal Overview section?

- Select the Submittal Reason from the dropdown menu. If the document requires approval, select “For Review and Approval.” If it is for information only, select “For Information only.”

7. What happens if a Submittal needs to be resubmitted?

- In case of resubmission, the status of the current Submittal record will be changed to Closed. A new resubmission record with all the details from the Submittal record will be auto generated, and the initiator will receive the task for re-submission.