Unifier Training
Unifier Cost Sheet Report

✓ Objectives

- Understand the Unifier Cost Sheet Report.
- Identify potential causes of discrepancy.
- Identify how to address different discrepancies.

✓ Summary of Common Causes of Discrepancy

- **Integration**
  - No Work Order Crew will stop integration
  - Price Certain Work Orders are not included

- **Mixed Budget Codes**
  - Unifier SOV budget codes do not match FAMIS Work Order budget codes
  - Budget codes on the same SOV do not match

- **Timing**
  - Integration happens once a night, at 7pm
  - Accounts Payable processing time, average 7-10 business days

- **Budget**
  - The Assigned Budget entered in Unifier is not up to date

✓ Basic Terminology Review

- **Cost Sheet Report**: Scheduled report that collects data from Unifier and FAMIS and displays them with certain logic.

- **Budget**: The agreed upon project sum and its allocation to different budget codes or categories.

- **Cost Sheet**: The tool in Unifier to centralize budget, PO, Invoice and Change amounts.

- **Schedule of Values (SOV)**: The specific cost values each Vendor creates for their individual PO amount.

- **Budget Codes**: The budget codes used to categorize work and expenditures.

- **Actuals**: The values that have been paid for a particular project. These migrate from FAMIS into Unifier via Integration.

- **Integration**: The interface to move data between systems. (FAMIS -> Unifier)

- **Budget Distribution**: Unifier tool used to move money from one line to another. Includes Audit Log to track all changes.

- **Budget Adjustment**: Business Process used to approve a net budget change.
Location of Cost Sheet Report Presentation
- [link](http://prezi.com/_lne-k3hciqb/?utm_campaign=share&utm_medium=copy)

Location of Daily report
- EAS
  - S:\Unifier Cost Sheet Report
- CPA
  - S:\unifier_cost_sheet_reports

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Attached: Page 3
- Unifier Cost Sheet Report Cheat Sheet
  - A detailed explanation of various issues and the corresponding resolution/root cause

Attached: Page 4
- Budget Entry Responsibility Chart
  - A breakdown of where, when, and by whom the budget should be entered at different stages of a project