Getting Started – Account Requirements and Accessing Processes

This document includes basic information related to accessing various electronic processes. Detailed instructions for specific electronic processes can be found in the following (separate) instructional documents:
- Creating and Submitting Schedule of Values
- Creating and Submitting Pay Applications
- Creating and Submitting CORAF

A. Accounts Needed by GC to Perform Roles in UA Electronic Systems
   1. UA PM will assist with setup and/or confirmation of the two (2) types of accounts required at onset of project. See account type information below:
      a) FA_NET\Account
         1) Used to access project sites on Estus
         2) Access is project specific and must be setup for each project separately
      b) LDAP / MyBama
         1) Used to access any process on Everest platform (ePayApp and eCORAF systems)
         2) Setup is a one-time occurrence - Account can be used for all UA projects once initially setup
   2. Renewal of both account types is required every 12 months, but most renewals are handled internally by UA without any action required by GC
      a) Contact UA PM for assistance if access is denied or notification is received that account has expired
   3. Please note that construction contracts and contract change orders are routed using DocuSign, which is a 3rd party software completely separate from Everest (ePayApp and eCORAF systems). No account is required to access or electronically sign documents routed by DocuSign.

B. Everest Quick Links
   1. Introduction
      a) Everest Quick Links menu appears on all Estus project sites that utilize ePayApp and eCORAF systems
      b) Sections 2 through 5 below provide a brief description of the purpose and utilization of each link type
      c) Detailed instructions for specific electronic processes can be found in the separate instructional documents referenced in top section of this document
   2. eCORAF List
      a) Accessible by all users in eCORAF workflow (stakeholders and all UA review roles)
         1) Only eCORAFs for which you are a stakeholder are accessible
      b) Initiate new eCORAF - By GC or UA PM stakeholders only
      c) Check status of eCORAFs that are in process (can be opened and viewed only, but not edited)
      d) View executed eCORAFs
3. **ePayApp Dashboard**
   a) Accessible by all stakeholders – UA PM, GC, FC, AE and Project Accountant
   b) Initiate new ePayApp (GC stakeholder only)
      1) All other roles that have access to ePayApp Dashboard have “view only” capabilities
   c) Check status of ePayApps that are currently in process
   d) Only ePayApps for which you are a stakeholder are accessible

4. **eROR Release of Retainage Dashboard**
   a) “View only” dashboard which shows all release of retainage requests (in process and executed) for projects which you are a stakeholder
   b) UA PM must initiate any release of retainage request

5. **My Worklist**
   a) Access and action all Everest tasks that are currently assigned to you
   b) All types of Everest tasks are shown in this single dashboard (eCORAF, ePayApp and Release of Retainage)