

Champ Agents, powered by Wyatt Quick Start Guide for AEC

A simple path to get your team into Champ Agents, understand the essentials, and launch one useful recurring workflow.

ACCESS

Get credentials and set up users

LEARN

Understand the few capabilities you need.

BUILD

Start with one recurring responsibility.

ACCESS

Get Champ Agents, powered by Wyatt site and users ready

Start here. Your team needs credentials, a working login, and the right user access before moving into learning or building.

1

Get your credentials

Once your Champ Agents site is enabled, your team will receive the credentials and access information needed to get started.

2

Plan for site enablement

Site enablement can take up to 2 to 3 weeks. Use that time to identify your initial users and the first business responsibility you want to improve.

3

Log in

Use the credentials provided to access your Champ Agents environment and confirm that the expected administrator can get in.

4

Set up users and access

Add the people who will participate in the initial rollout and confirm the appropriate roles, permissions, identities, integrations, and data access for the work they will do.



Helpful setup guides

[Permissions & Roles](#)

[SSO Identities](#)

[Product Identities](#)

[Integrations & Logins](#)

Before moving on

Confirm at least one administrator and the initial pilot users can access the environment and the information they will need. Test with representative users, not only an administrator.

LEARN

Discover the essentials about Champ Agents, powered by Wyatt capabilities

You do not need to master every feature before you start. Learn the few capabilities that help you explore information, support reasoning, present results, and work with durable files.

CHATS



Use Chats to ask questions, explore available data, test ideas, and learn how Champ Agents works with your information

[Open the Chats guide »](#)

CHORES



Schedule tasks that automate work across your business processes.

[Open the Chores guide »](#)

ROUNDUPS



Create interactive apps and reports that perform analysis, run agentic tasks, and give you clear outputs with recommended next steps.

[Open the Roundups guide »](#)

ARTIFACTS



Manage files and outputs created with Champ Agents and easily share them via download, email or directly in Chat.

[Open the Artifacts guide »](#)

IDEAS



Get inspired by common use cases and deploy with a click.

[Open the Ideas portal »](#)

The fastest way to learn



Open a Chat

Ask a few questions using information you already know so you can judge whether the available context is useful.



Explore one capability at a time

Look at a Chore, Roundup, or Artifact when your use case actually needs it. Do not try to learn the whole platform at once.



Move quickly into a real workflow

Learning becomes more useful once it is tied to a recurring responsibility your team already understands.

Keep learning practical

The goal is not product mastery. The goal is enough familiarity to build, test, and trust your first useful Champ Agents, powered by Wyatt workflow.

Start with one recurring business process

Choose one job someone on your team already has to remember to do repeatedly. Make the first workflow narrow enough to validate and useful enough that people will notice the difference.

Good first workflows

Opportunity signal and intake

Turn emails, meetings, documents, and everyday relationship activity into structured opportunity signals so potential work gets captured and acted on earlier.

Pursuit qualification and go/no-go

Bring together relationships, experience, capacity, profitability, and pursuit requirements to help teams decide where to invest their time and resources.

Project initiation and setup

Move won work from award to execution by gathering contract and pursuit context, routing approvals, and preparing the project for setup.

Resource planning and staffing risk

Identify upcoming staffing gaps and model how wins, losses, delays, and changing project demand affect capacity so teams can adjust earlier.

Pre-bill review

Review labor, expenses, billing, contract terms, and project context before invoicing to surface issues and protect revenue.

Time & expense, compliance

Find missing, late, or mis-coded time and expenses and prepare the appropriate corrections and follow-up.

Executive decision support

Bring together pipeline, backlog, project performance, financials, and operational activity into a decision-ready view of what needs leadership attention and what should happen next.

Client health and recovery

Combine relationship activity, project performance, profitability, collections, and contract issues to identify deteriorating client health and recommend actions before the relationship is at risk.

Define the work in six questions

What should happen? Describe the recurring job in business terms.

What information should it use? Identify the trusted systems, data, documents, or other sources required.

When should it happen? Decide whether the work is manual, scheduled, or triggered by an event.

Who owns the result? Name the person responsible for confirming that the output is useful and correct.

What should happen when something needs attention? For example: summarize it, prepare a review, notify someone, request approval, or take an authorized action.

How will you know it worked? Define what a useful result looks like before you launch.

A simple starting test

Complete the sentence: "Someone currently has to remember to..." If the answer describes recurring monitoring, preparation, analysis, routing, or follow-up, it may be a strong first Champ Agents, powered by Wyatt use case.

Build it. Check it. Then expand.

Before putting the workflow into normal use, make sure the basics are right. Keep the first launch controlled and easy to validate.

- ☐ Champ Agents, powered by Wyatt credentials have been received and the environment is accessible.
- ☐ Initial users and permissions are set up.
- ☐ The first recurring business responsibility has a clear owner.
- ☐ The required data, systems, and supporting information are available.
- ☐ The workflow has a clear trigger or timing.
- ☐ The intended result and any approval requirements are understood.
- ☐ The first run has been compared with known or expected information.
- ☐ Representative users can see the right information and no more than they should.
- ☐ The business owner agrees the result is useful enough for normal use.

Then keep it simple.

Put one workflow into normal use

Let the intended users work with it and gather concrete feedback.

Improve what matters

Adjust the workflow when the owner sees a real issue with data, timing, instructions, access, or the result.

Choose the next responsibility

Once the first workflow earns trust, repeat the same pattern with the next high-value recurring job.

Start with one. Prove value. Repeat.

Champ Agents, powered by Wyatt creates the most value when customers move one familiar recurring responsibility into a trusted, governed workflow, then expand from what they learn.

Need More Help?

Contact your CSM today to learn how Unanet Implementation services can take Champ Agents, powered by Wyatt to the next level



More than 4,200 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and accelerate business growth. To learn more about Unanet's ERP and CRM solutions, visit unanet.com.