Seattle Public Utilities

Unifier Training Guide

Construction Management Document Management and Workflow System

User Guide for Contractors

Table of Contents (TOC)

FREQUENTLY ASKED QUESTIONS 18

Introduction

Unifier is the Construction Management Division (CMD) system for managing the flow of information on all Seattle Public Utilities (SPU) Capital Improvement Projects. Unifier tracks and manages contract documents from Construction to Closeout Phase.

Key features of Unifier include:

- Web based system accessible by all project team members. No installation or City of Seattle network access is required.
- Seamless process for uploading and routing Submittals, RFIs, Field Memos, Redlines/Asbuilts and Correspondence, with visibility during the entire workflow.
- Up to the minute status on a review process.
- Alerts for tasks and notices via email and within the system.

If you need additional help outside of this guide on features or operations within Unifier, the following resources are available to you:

- **Oracle Unifier Help:** Click the (?) in the top right corner of Unifier next to your name and select "Unifier Help" to search for topics. Please note, this is a generic document. Not all features are used in SPU CMD's version of Unifier.

- **Unifier System Administrator:** For specific questions or to reset your password contact:

    Jenny Deininger
    Email: SPU_CMD_SystemAdministrator@seattle.gov
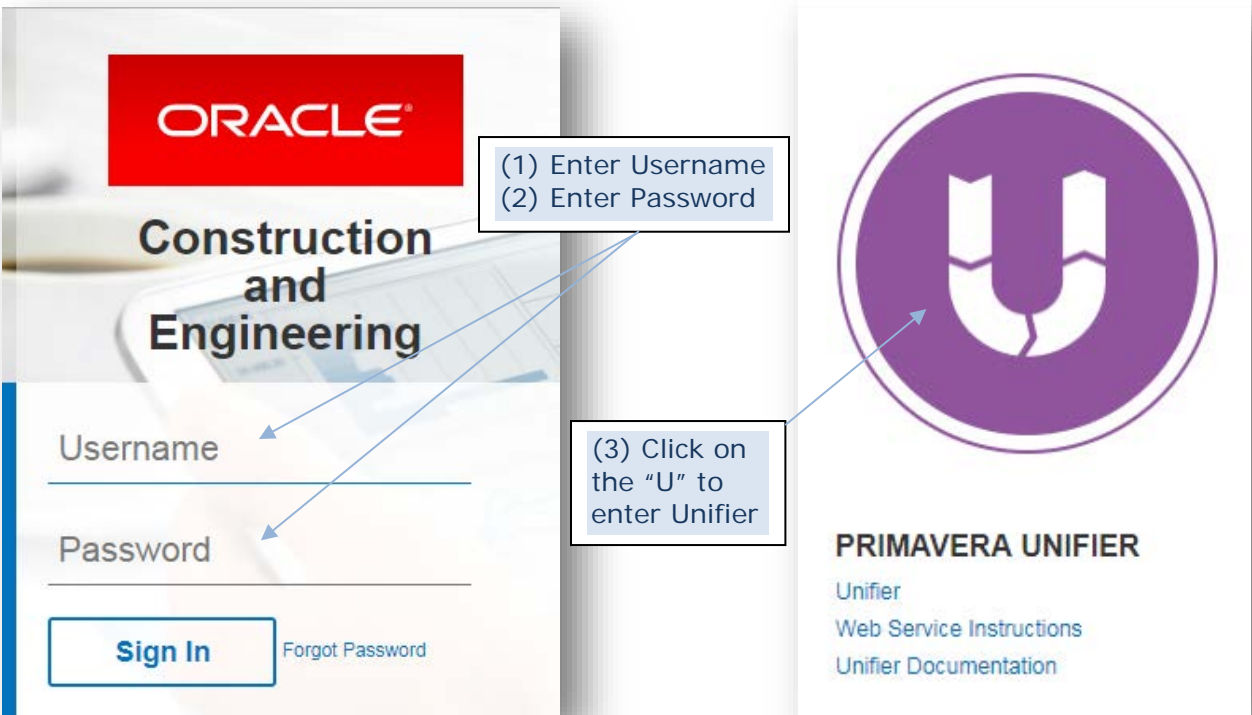   Phone: 206.684.0593
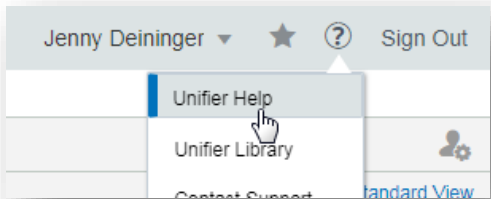
Welcome to Unifier – First Time Login

You will receive a temporary password through your email. Upon receipt, please follow the instructions in the email as shown below.

Log into **Unifier** at www.seattlecmd-unifier.oracleindustry.com

The first time you log-in, Unifier will ask you to change your password and set up password recovery questions (challenge questions.)

Navigate through Unifier

Receive Tasks and Messages from Unifier

Unifier will send you an email if you've received a task or message (information only document). You can click on the link in the email and follow the prompts to log in and view the tasks. You can also view tasks and messages on the Home and SPU Contracts tab or by selecting the Collaboration Node.

Navigation Tabs

Unifier uses tab-based navigation.

- **Home**: Displays a task, message and draft log for all your assigned projects
- **SPU Contracts**: Lists all projects assigned to your license
- **Company Workspace**: Not used, you can close it by clicking the "x" in the right corner
- **(+)**: Click the plus sign to add more tabs, useful if you have multiple projects

Finding your Project in Unifier

To open your project, select the **SPU Contracts tab**. Double click on your project in the Contracts Log (bottom window) to open it.
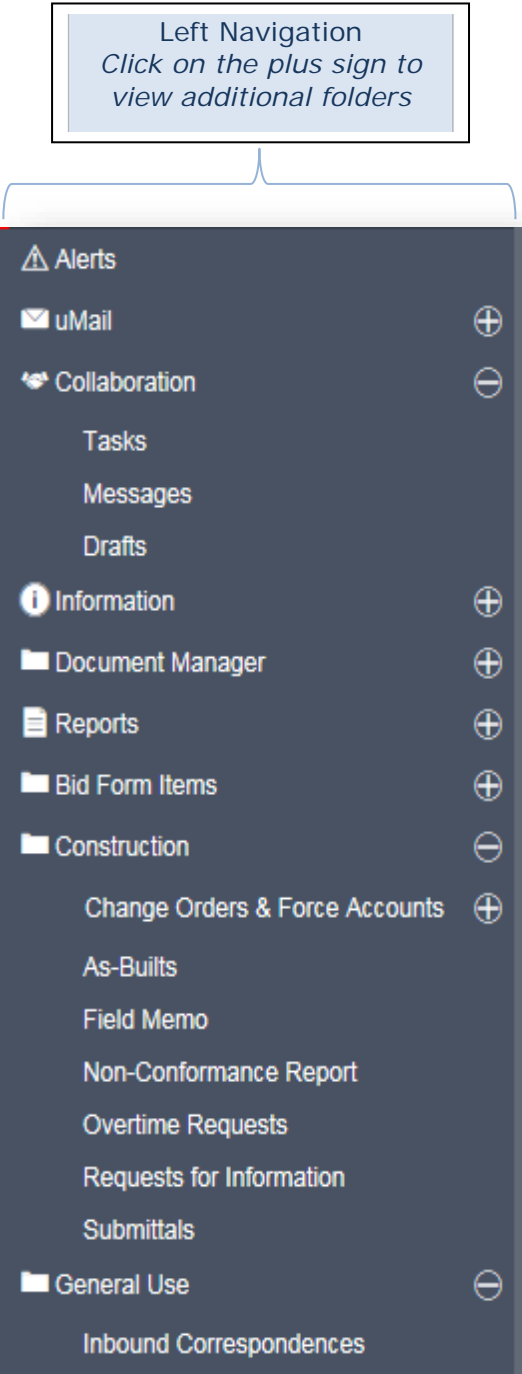
Business Processes vs. Document Manager

Left Navigation
*Click on the plus sign to view additional folders*

Business Processes

A Business Process (BP) is a form in Unifier that uses a workflow to record the creation, review and distribution of a record. Examples of BP's covered in this guide are Submittals, Request for Information, As-Builts, and Inbound Correspondence.

BP's can be found in the Left Navigation pane of the window in each project. BP's availble to you are found under the **Construction** and **General Use** nodes. To view the content of each folder, click on the plus sign to expand or collapse.

Document Manager

The Document Manager (DM) maintains all the files and documents for a project. Each project has its own DM. A BP will automatically publish its records, along with their attachments, to the DM in a specified "folder" when the BP is complete.

It is best to view a record in the BP, however some records (for example, a pdf copy of the Award Book) will not have a BP and will be located exclusively in the Document Manager.

Business Processes
*Expand the **Construction** and **General Use** folders to find BP's*
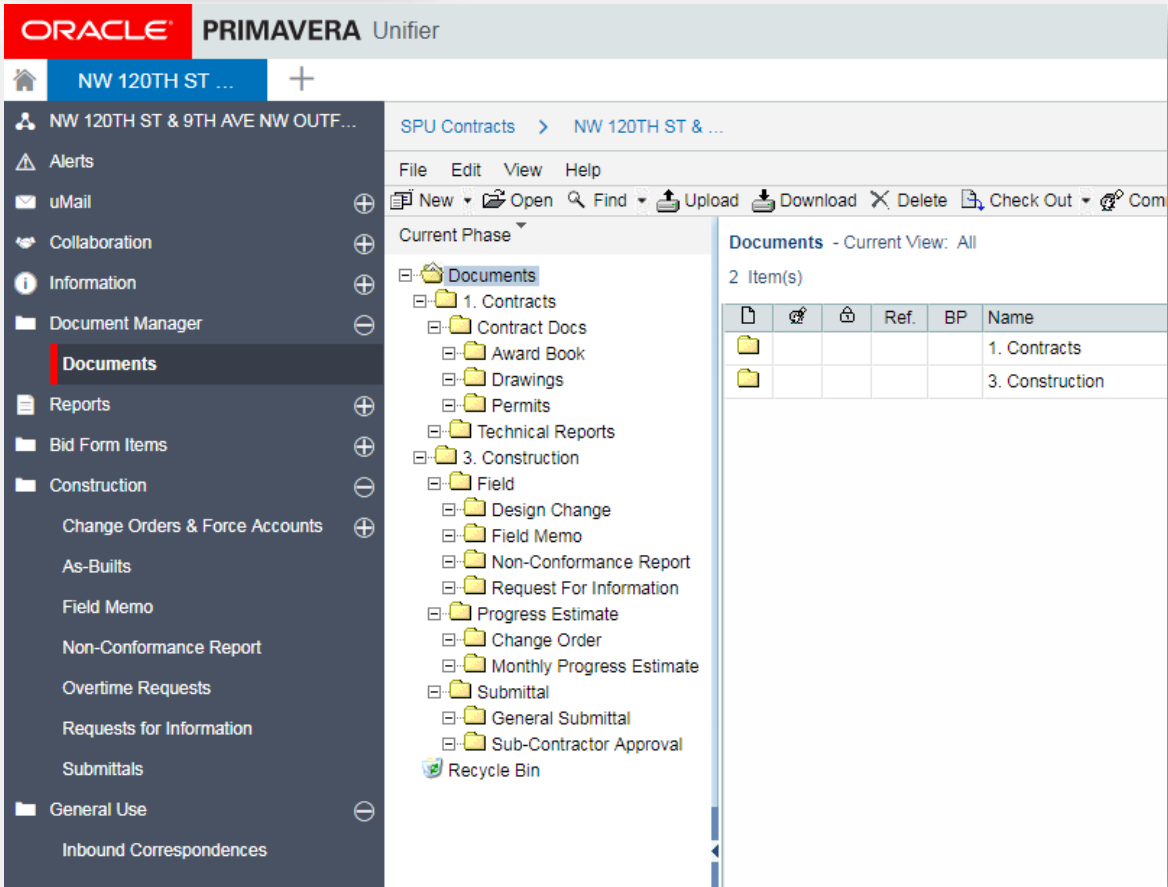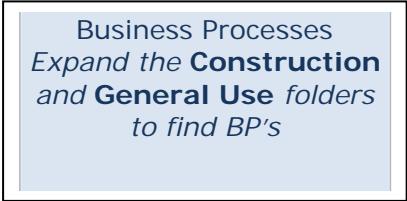
Submittals

Create a New Submittal

1. Click the Submittal BP

Click the Submittals BP
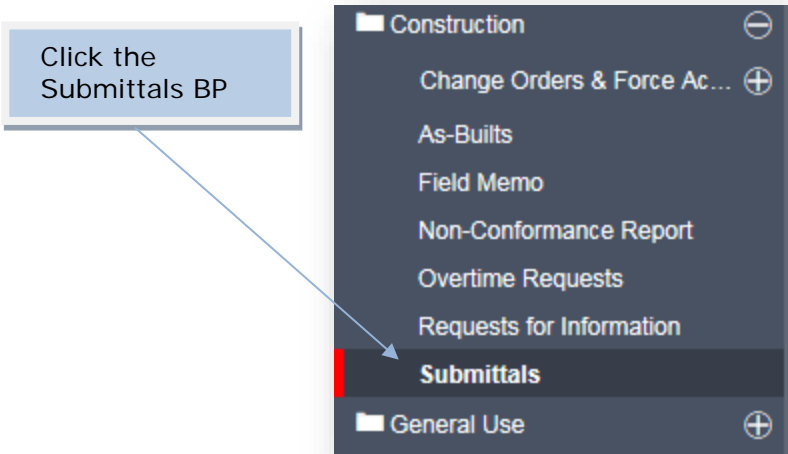
2. From the Toolbar, click New.

3. A "Select Workflow" box will display. Choose the workflow that matches your submittal type:
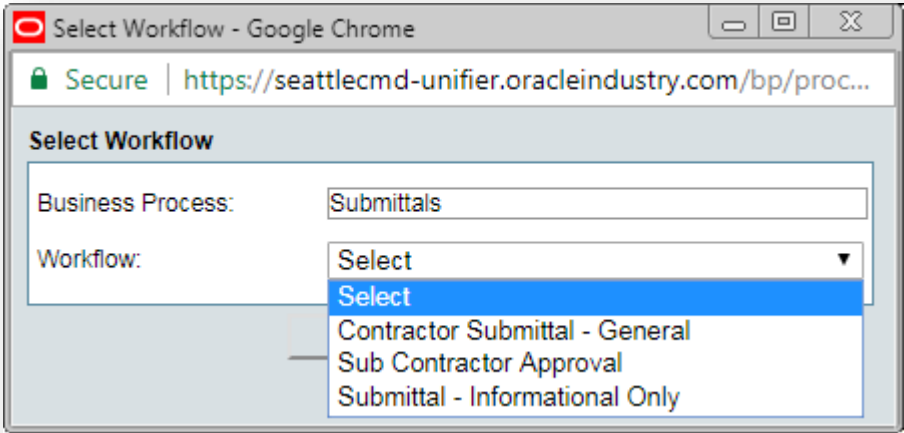
- ✓ **Contractor Submittal - General:** Choose for general submittals which need to be reviewed and approved by SPU.
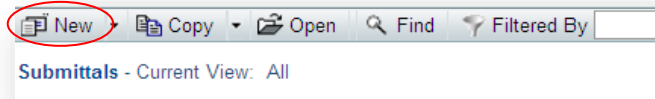
- ✓ **Sub Contractor Approval**: Choose for Subcontractor Approval Applications.

- ✓ **Submittal – Information Only:** Choose for submittals that are not approved by SPU but need to be sent to the project team for information only. *Example*: Traffic Control Plans approved by SDOT

Please contact your CMD Submittal Lead for clarification if you are unsure which workflow to select.

Enter Submittal Info on Form

The Submittal BP acts like a digital transmittal to SPU.

1. Expand the upper form (General)

2. Enter into the upper form:
   - Description: overwrite the text using the naming convention
   - Contractor Ref #: (enter "0" if you do not have your own number)
   - Document Type:" -select- appropriate type (i.e. Shop Drawing, Plans, etc.)
   - Contractor Comments: if desired

Add Bid Items

1. Expand the lower form: Bid Item Details.
2. Select the Add button or the Grid button to begin adding bid items.
   - **Add Button**

   a. To enter Bid Item, click the Select button, the bid item list will display.
   b. Double click on the specific bid item
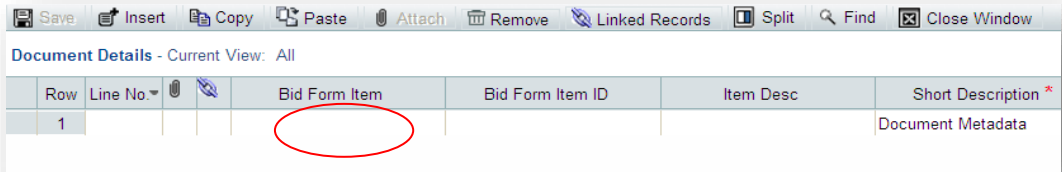   c. Repeat Step a to add more bid items

OR

- **Grid Button**

a. Double click in the cell underneath the Bid Form Item column. The bid item list will display.

b. Double click to select a specific Bid Item
c. Tab to go to the next cell or row
d. Repeat Step a to add more bid items
e. Save and Close

Add Attachment

1. Click "Add Attachment" and select My Computer to upload your PDF formatted submittal document. Click Browse or drag and drop your file into the window.
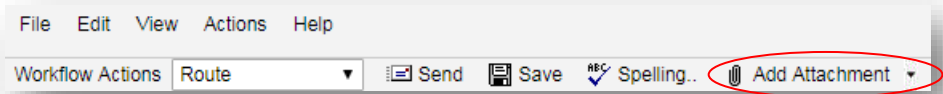
2. Click Upload

Note: The file name of the attachment should be the same as the document description. Follow Naming Convention.

Route Submittal to SPU for Review

1. Click the Workflow Actions dropdown (upper right-hand corner) and select "Route"
2. Click Send
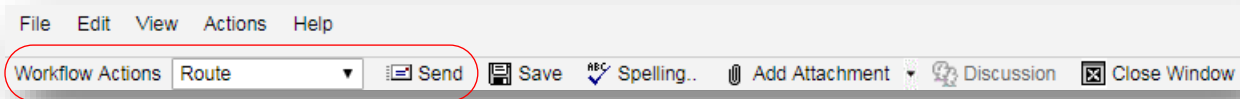
Re-Submit or Withdraw a Submittal
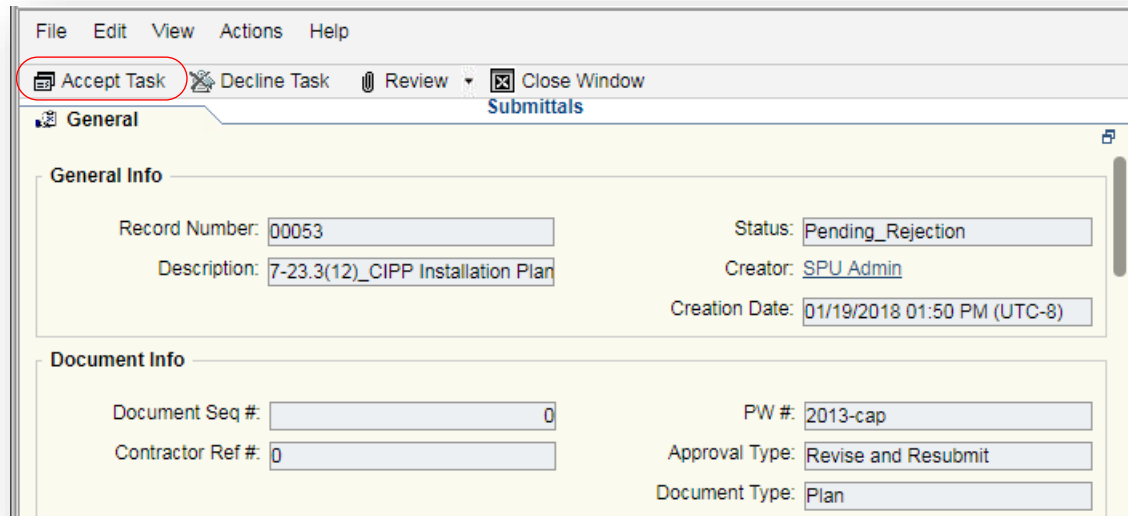
Submittals may be returned to you for more action. You will receive an email notice and a task with the Approval Action of "Submit Specified Item", "Rejected" or "Revise and Resubmit". The status will show "Sent for Contractor Revision" in the submittals log.

You can find reviewer comments in:

- CMD Comments (General section of the record)
- Attachment with reviewer comments
- General Comments (these are typically from the Submittal Lead)
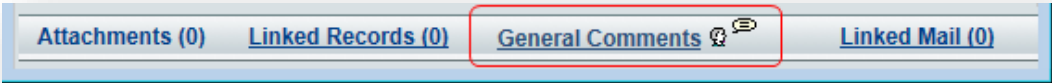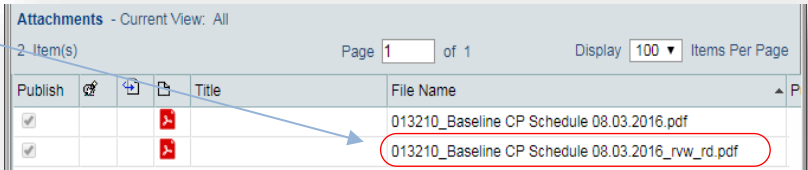
Start by accepting the task:

After addressing the comments and attaching your response, choose a Workflow Action:

- *Send Revision*: Resubmits your revision for further review
- *Withdraw*: Retracts the original submittal and closes the record

> **Note:** If you do not see the "Withdraw" workflow action available, contact your Submittal Lead so they can send it back to you with this option.

Submittal Tips

- One user allowed per Unifier license (don't share passwords - use the proxy feature)

- If a user will be leaving the project, notify SPU_CMD_SystemAdministriator@seattle.gov to set up a replacement. Any outstanding tasks for that user need to be cleared out or reassigned.
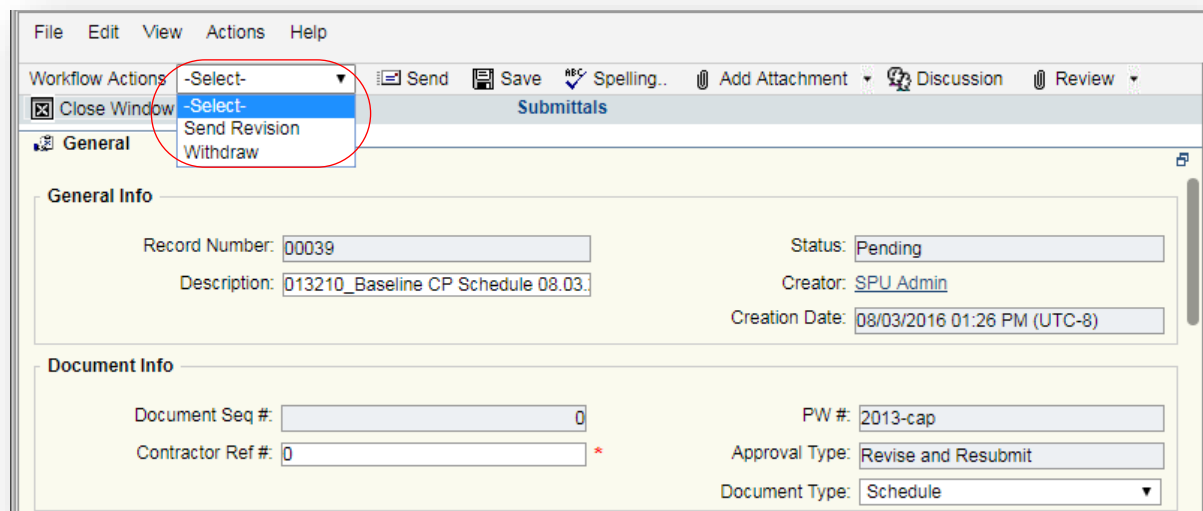
- One submittal package per Document Type (see Naming Convention document and dropdown field in the General Info section)

- One attachment for each version of the submittal (pdf preferred w/ exception of the project schedule)

- *Don't delete any attachments* unless directed to do so

- Follow naming convention for attachments on Re-Submittals
  (existing naming convention_Rev#)

> **Note:** If a submittal is returned for formatting changes (instructions will be in the General Comments section), do not add a revision number to the attachment or document description field unless directed to do so.

Request For Information (RFI)

Click the Request for Information BP
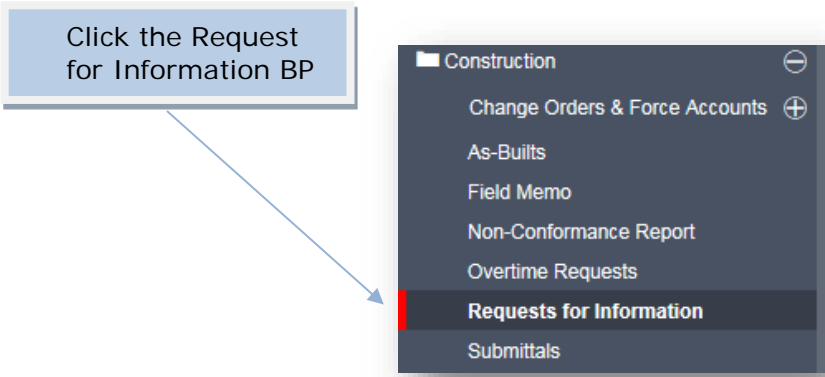
- From the Toolbar, click New
- Expand the upper form (General)
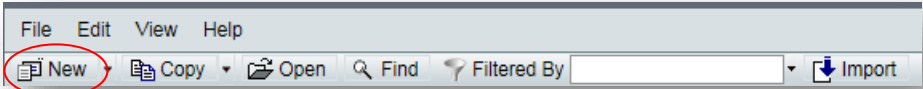
- Enter information into the RFI form (shaded boxes are automatically generated)

Add Attachment and Send RFI

To add an attachment, click the Add Attachment button located on the Toolbar.
- Select "my computer" and browse for the file or drag and drop the file into the window
- Click "Upload"

When you are ready to send it, go the Workflow Actions dropdown on the upper left corner and select "Submit" then click "Send".
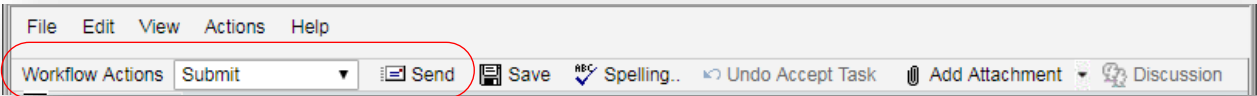
Withdraw an RFI

You have the option to withdraw an RFI if the record has not been closed. The option to withdraw will appear under Workflow Actions. If you do not see this option, ask the Submittals Lead to return the record to you.
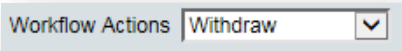
Field Memo (FM)

The Construction Engineer will send Field Memos via Unifier. There may however be a need to expedite a directive in the field. A Contractor Rep will receive a hard copy in the field. Then when time permits, the Construction Engineer will upload the signed hardcopy into the Field Memo BP and route for Acknowledgement of receipt.
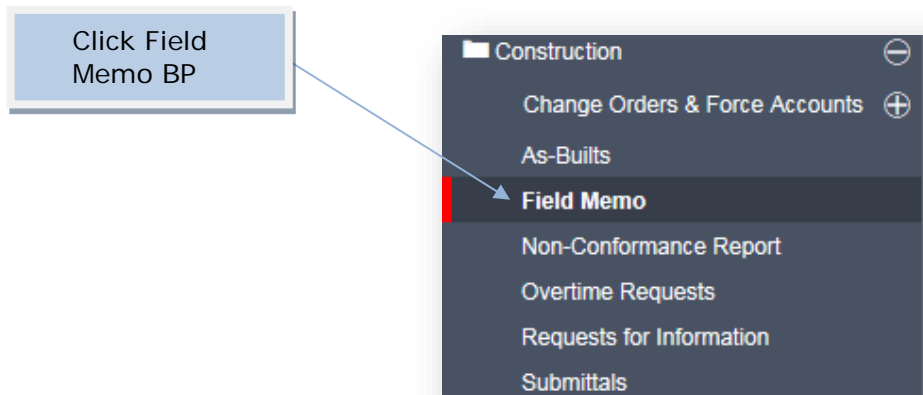
Your only "Task" in the Field Memo BP is to acknowledge receipt:
1. Accept Task
2. Review information in the Field Memo
3. Go to the upper right-hand corner of the form and select "Acknowledge."
4. Click Send

As-Builts - Contractor

Click the
As-Builts BP
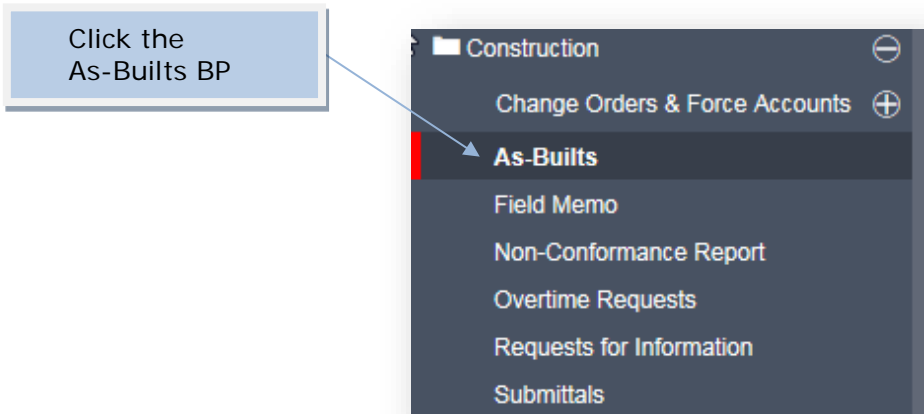
1.   From the Toolbar, click New.
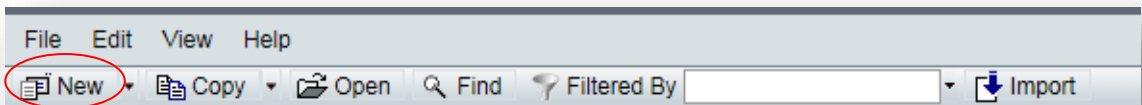
2.   From the dropdown list, choose the workflow "Contractor As-Builts"
•   Enter appropriate information in the upper form:
      • Description (use a consistent naming convention and a clear description)
      • Contractor Comments (if desired)

3.   Click the Add Attachment button from the Toolbar, choose My Computer
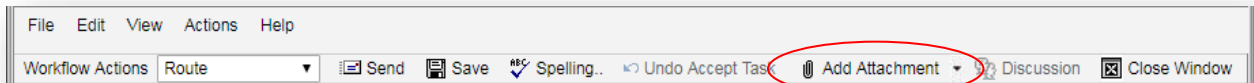
4.   Click the Browse button or drag and drop your files into the window.
5.   Click the Upload button. You will notice the number of Attachments increased at the bottom of the window:
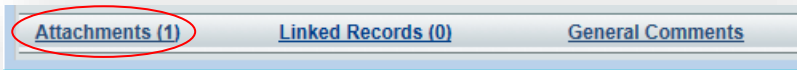
6.   Go the Workflow Action dropdown on the upper right-hand corner and select "Route".
7.   From the Toolbar, click Send.
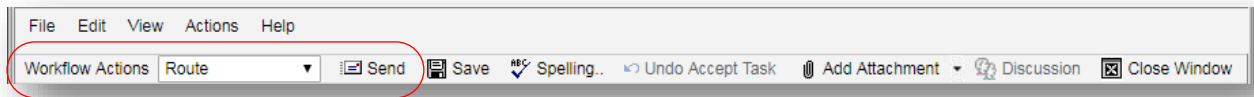
Note: If you are hand delivering a hardcopy of the As-Builts, indicate this in the Contractor Comments section of the record. Provide the date and the individual you delivered them to.

Inbound Correspondences

Inbound Correspondences are official letters to Construction Management Division regarding the project. An example of this would be a Serial Letter or Memo.

Click Inbound Correspondence BP
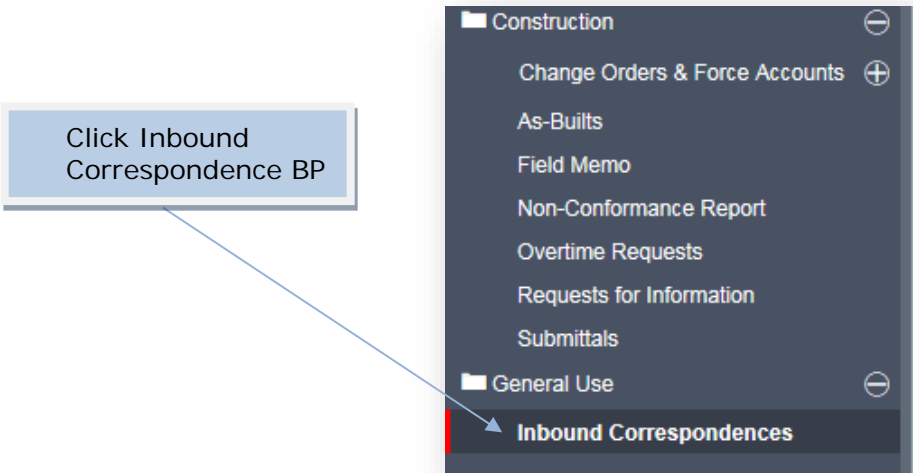
1. From the Toolbar, click New.
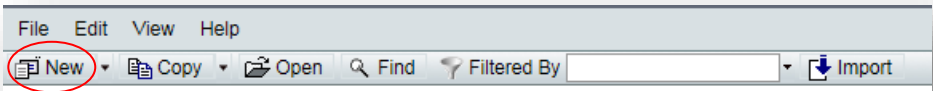
2. Expand the upper form (General).
- Enter appropriate information in the upper form:
  - Description (use a consistent naming convention and a clear description)
  - Contractor Ref # (your preference, enter "0" if no number desired)
  - Document Type (select one)
  - Comments (if applicable)

- Click the Add Attachment button from the Toolbar, choose My Computer
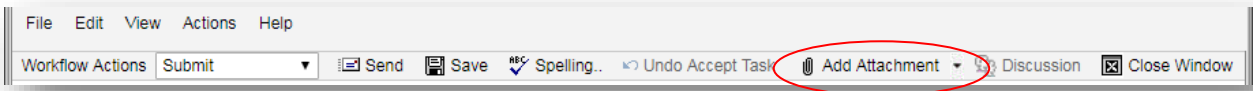
  - Click the Browse button or drag and drop your files into the window
  - Click the Upload button
  - You will notice the number of Attachments increased at the bottom of the window:
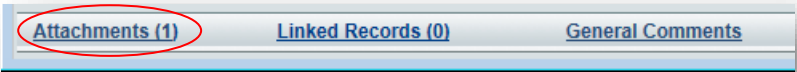
3. Go the Workflow Action dropdown on the upper right-hand corner and select "Submit".
4. From the Toolbar, click Send.
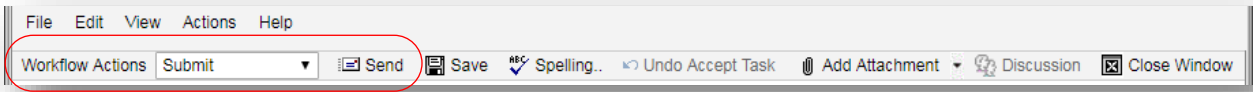
General Functions

Print Submittal Coversheet or RFI

Use the Custom print feature to export the record out of Unifier:

1. Open the record from the business process log
2. Go to File, Print Preview, and select Custom
3. From the Custom window, highlight the description under Title box
4. Click OK
5. Click Open and a Word document will display

Note: Custom printing does not include any attachments. You will need to print those separately.
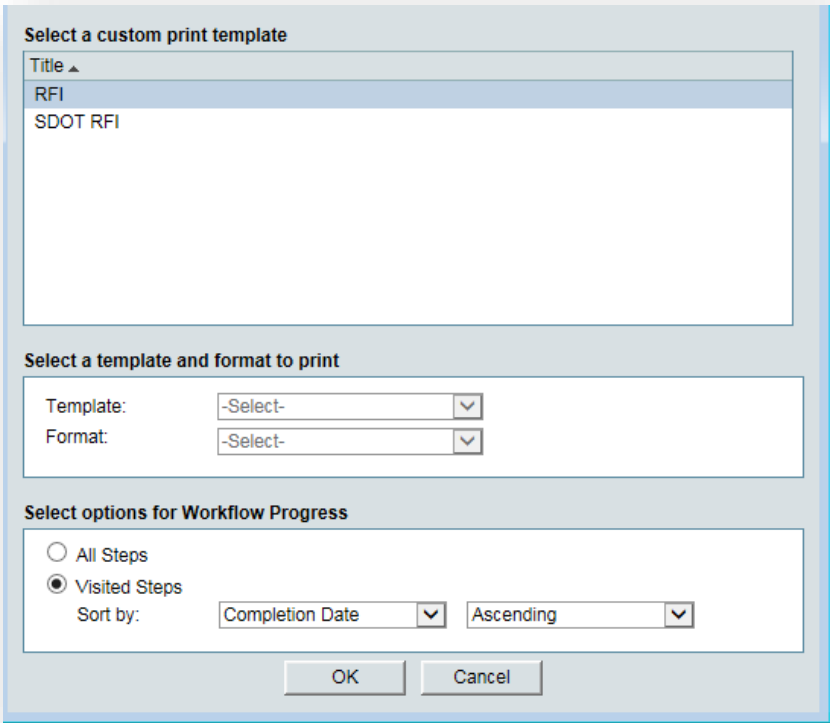
Print Reports

1. Go to the Left Navigation and select Reports
2. Click User-Defined
3. Double-click on the report
4. Go to the lower half of the dialog box, under format choose your preference
5. Click Run

Collaboration Node

Locate the Collaboration Node on the left-hand side of Unifier. Under it you will see Tasks, Notifications, and Drafts.

Tasks

Tasks are business processes that you are involved with and are in process. To view all tasks assigned to you, click on "tasks" under the Collaboration node. You can view attachments, workflow progress, and open the business process from this window.
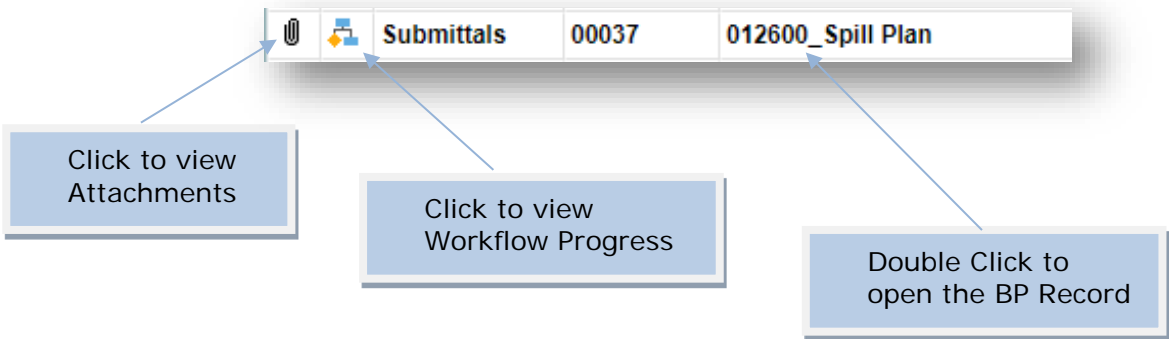
Notifications

Notifications are business processes that you have been sent a copy but do not need to take action.

Drafts

Drafts are business processes that you have worked on and saved but have not yet sent.

Withdraw a Record

Submittals and RFI's can be withdrawn if the record has not been closed.
1. Open the record and click "Accept Task"
   - If you can't accept the task, contact your submittal lead for help in getting the record returned to your task cue.
2. Select "Withdraw" from the Workflow Action dropdown, located on the upper left-hand corner of the form.
3. Click Send.

Note: Once a record is closed it cannot be modified or deleted.

Avoid Being Locked Out of Unifier

Unifier allows 7 log in attempts to provide the correct password/username. The system will lock you out after your 7th attempt to log into Unifier. Set up password recovery Challenge Questions to allow password recovery on your own.
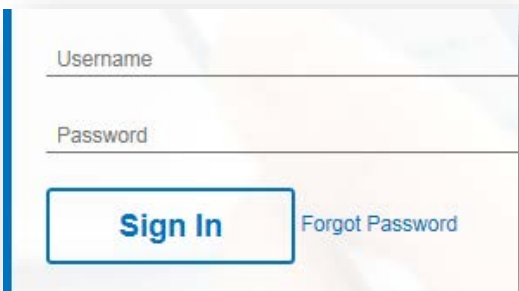
1. Set up your **Challenge Questions** for password recovery (see Managing Password below)
2. Select the "Forgot Password" link and follow the prompts to select a new password

Note: The System Administrator can unlock/reset your password. This can take anywhere from 20 minutes to 24 hours.

Managing Password and Basic User Information

The Oracle Identity Manger link is located on the landing page prior to logging into Unifier and allows you to modify basic user information.

1. Click on the Oracle Identity Manger link to change your password, contact info, and password recovery questions. If prompted for a username and password, enter the same credentials you use for Unifier.
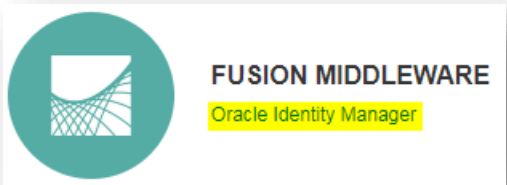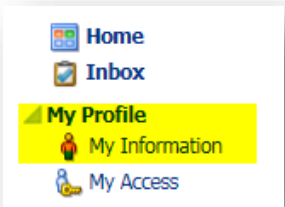
2. Using the left navigation pane, click on My Profile > My Information

From there, you can edit Basic User Information, Change Password, and modify Challenge Questions (for password recovery). Modify the fields you wish to change and then choose "Apply".

Note: Give the system at least 5 minutes to process your changes before logging in again. Some fields like First Name, Last Name must be approved by the System Administrator.

Using the Proxy Feature

A license in Unifier acts as your digital signature. License sharing is not allowed. Tasks assigned to your account can only be worked on by you. If you need coverage during an absence, the Proxy feature allows another licensed user of your choice to and act on your behalf. You can assign more than one proxy for your account.

Assign a Proxy on Your Behalf

1. When logged into Unifier, click the dropdown arrow next to your name

2. Click on "Preferences"

3. On the Proxy tab, choose "Add" to find the name of the user you want to assign for your proxy.

4. Select the date and time range you need coverage for, or leave the dates blank for open ended coverage.

5.

Log in As a Proxy for Another User

1. In Unifier, click the dropdown arrow next to your name

2. Hover over "Proxy For" and a list of names you have access to will appear.
   Click on the name you want to proxy for and it will automatically log you into their account.
   To verify you are in the right account, you will see your name change to "Proxy for ….".

3. Click "Sign Out" to log back in to your own account.
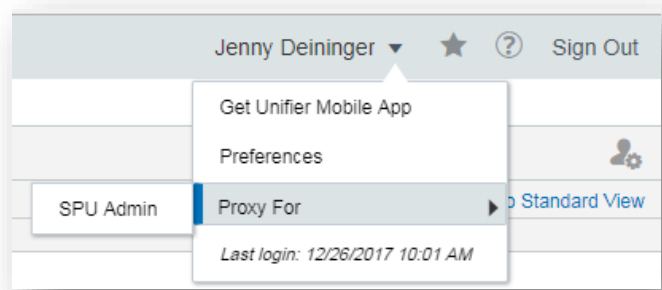
Frequently Asked Questions

Q: How do I withdraw a submittal or RFI?

a. **Answer:** After accepting the task, if you don't see the option to withdraw under Workflow Actions (top left of the form) have the Submittal Lead send the submittal back to you. You will receive a task sent to your email and in your Task log within Unifier. Open the record and go to the upper left-hand corner of the form and select "Withdraw" from the Workflow Action dropdown. Then click "send". Learn More

Q: Does the Description field in Unifier and the submittal file name need to match?

a. **Answer**: Yes. Follow the naming convention provided when naming the submittal attachment: Link to File Naming Convention document. This file name is also entered in the Description field on the upper form. You will need to overwrite the description that defaults on new records in the General section of the form. Learn More

Q: What if my submittal has been rejected and I need to resubmit?

a. **Answer:** If your submittal has been rejected or requires that you resubmit, use the same record to resubmit. Accept the task and keep the same naming convention for your attachment but include an underscore and indicate the revision number. For example: 2-05.3(6)_SD_SS Weir Plate (MH 025-380) **_Rev2**. You will not have to change the Description field in Unifier. Learn More

Q: Where are the Reviewers Comments?

a. **Answer:** There are three places review comments can be found:
   1) As an Attachment (most common): At the bottom of the submittal record, click on the Attachments link. You should find both your original submittal as well as the Reviewers response to the submittal.
   2) CMD Comments: a section located on the upper form.
   3) General Comments (formatting or distribution comments from the Submittals Lead are here, not typically used for reviewer comments): An icon will appear (a little face) next to the General Comments link at the bottom of the form if they exist. Learn More

Q: Can I print the log?

a. **Answer:** When selected on the Business Process node and in Standard View, you can print the log by selecting the printer icon. To run a printable report or export the logs (submittal log or RFI log), go to the left navigation and select Reports | UserDefined | Contract Management Record of Submittal. You can also view a report which captures outstanding RFIs. Learn More

Q: How can I find the status of a record?

a. **Answer:** Go to the record from the business process log. Double click on the record and view the Task Details section in the middle. The "To" line is who currently holds the task. To see more detail select View > Audit Log… at the top of the record and choose print to expand the actions taken in a pdf report.

Q: I forgot my password! Recovery questions are not working. How do I get into Unifier?

a. **Answer:** Contact the SPU CMD System Administrator to reset your password. Once you receive a temporary password, go into Unifier and change your password. Remember to set your challenge (password recovery) questions so you can quickly reset your password on your own. Learn More

   Email: SPU_CMD_SystemAdministrator@seattle.gov
   Phone: 206.684.0593

Q: How many licenses can I get as a Contractor?

a. **Answer:** The contract calls for 2 licenses per Contractor company. If you have compelling reasons on why you need more than two, you will need to address your concerns with the Construction Engineering Supervisor and the Project Manager on your project. There may be an additional cost.