

Unifier Training Guide



Construction Management Document Management and Workflow System

User Guide

Introduction

Unifier is the Construction Management system for managing the flow of information for all SPU Capital Improvement Projects. It provides a seamlessly automated and integrated environment. Unifier tracks and manages SPU Construction Management Division contract documents from Design to Closeout Phase.

If you need help with specific features or operations within Unifier, the following resources are available to you:

- **Unifier User Guide:** This guide provides a comprehensive guide to Unifier. The instructions provided will provide guidance to managing contract documents and business processes for Seattle Public Utilities (SPU) Construction Management Division (CMD).

Note: Skire (vendor for Unifier) also provides a guide. We do not recommend using this guide for general users.

- **[User Productivity Kit \(UPK\)](#):** You can watch step by step instructions on how to create or review a business process record, view attachments and records in the Document Manager, create reports/dashboards and perform various other features within Unifier. (Internal access currently)

For additional questions or needing to reset your password contact:

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Phone: 206.684.5191

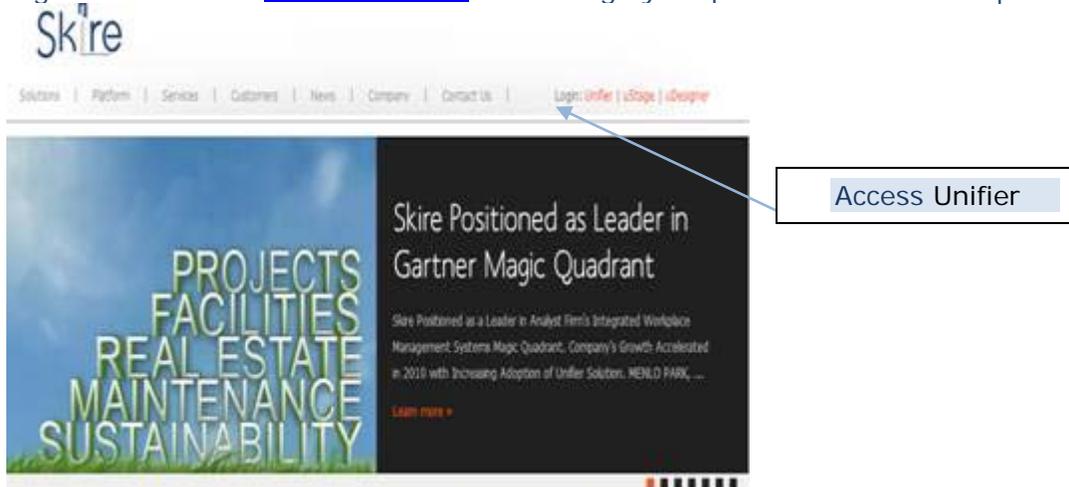
Things to Remember Before Using Unifier and CCMS

- ✓ Save periodically when using Unifier (at least every 30 minutes). System will log out users 1-2 hours.
- ✓ Check your Task log once or twice a day. At times, there may be a delay with the email notifications.
- ✓ Check to make sure your File Transfer Option is set to Basic or Intermediate in Unifier. If Intermediate is working contact the System Administrator. Never use the Advance File Transfer option.

Welcome to Unifier

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

Log into **Unifier** at www.skire.com and change your password as soon as possible.



To change your password:

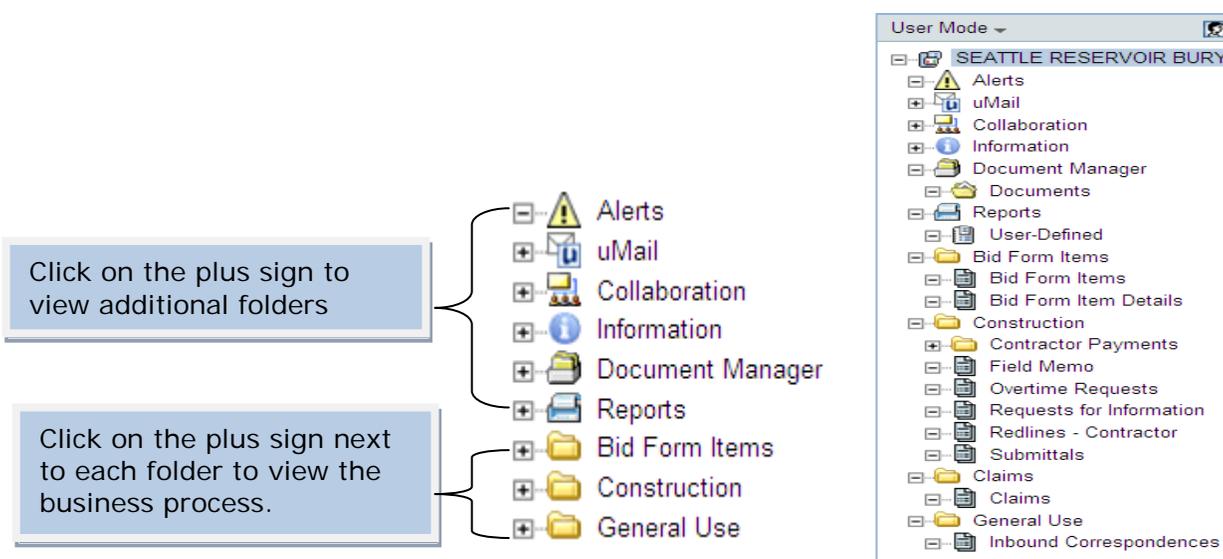
- Click on **Preferences** at the top right hand of the screen
- Select the **Security** tab
- Type your new password into the **Password** field
- Type the same password into the **Confirm Password** field
- Set your **Password Recovery Secret Questions** and Answers

Training Guide Outline

1. [Navigating through Unifier](#)
2. [Submittals](#)
3. [Request for Information \(RFI\)](#)
4. [Redlines Contractor](#)
5. [Inbound Correspondence](#)

1. Navigate through Unifier

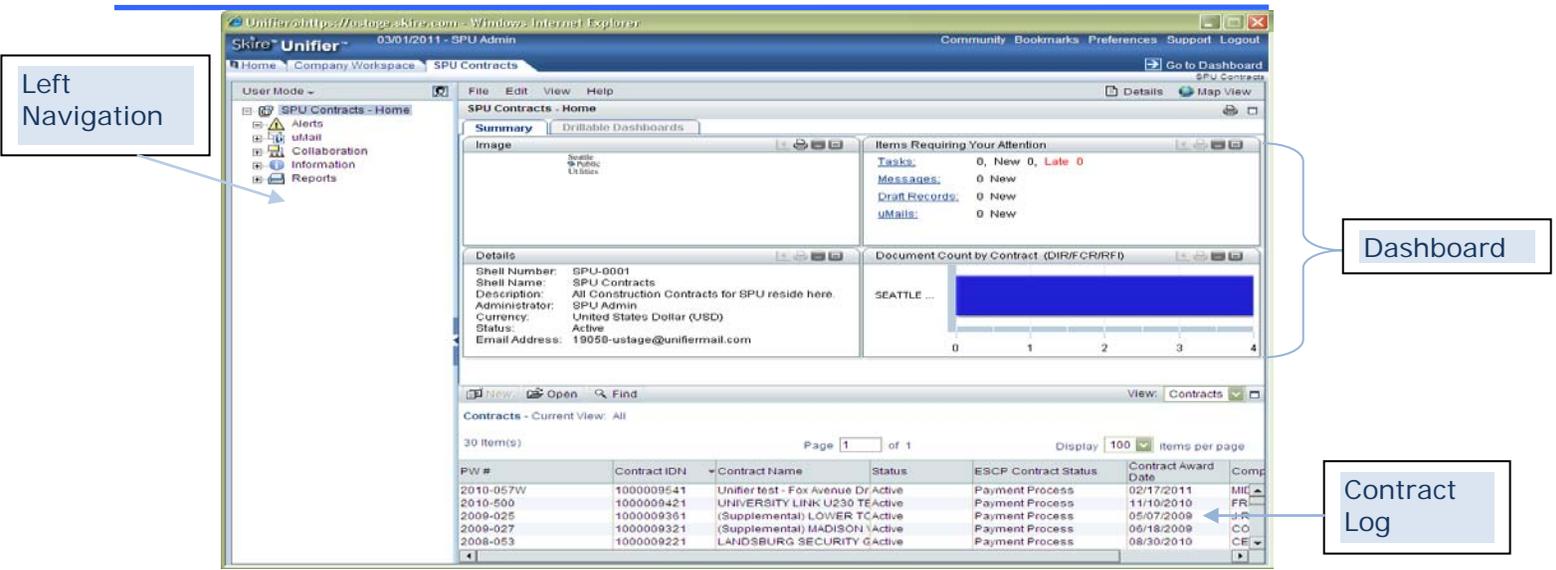
The primary means of accessing Unifier is from the Left Navigation, located in the left pane of the Unifier window. The Navigator is similar to a network drive. Generally most users will be able to view all the nodes and business process folders as shown below. Exceptions would be consultant designers and contractors.



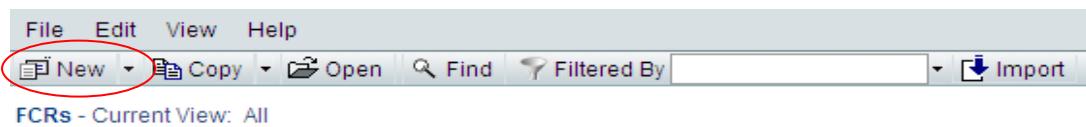
- ✓ On the Homepage, you will see three (3) Navigation tabs: Home, Company Workspace and SPU Contracts. To work on your project select the **SPU Contracts tab**.



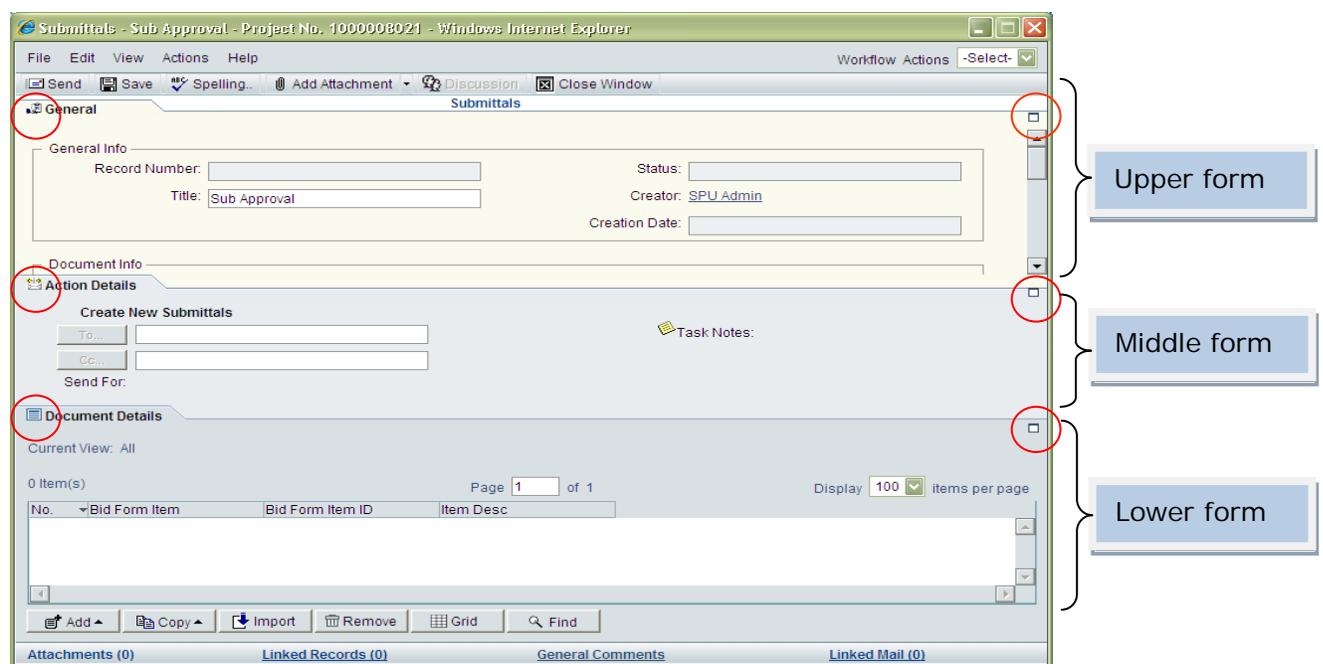
- ✓ The SPU Contracts window is divided into three sections: Left Navigation, Dashboard and Contract Log.



- ✓ From the Contract Log, double click on your project.
- ✓ From the Left Navigation, go to a specific folder or node and click on the plus sign to expand and view the various business process or function.
- ✓ Expand Construction folder (click on plus sign) See diagram below.
- ✓ Select the appropriate business process (Submittals, RFI, Redlines, etc)
- ✓ From the center pane, click **New** (located right below the File menu). See diagram below.



- ✓ New window displays and you will find a form with either 2 or 3 distinct sections: Upperform (General form), Middle form (Action Detail), and Lower form (Line Item Details)



NOTE: To expand the upper/middle/lower form click on the expand icon located on the upper left corner (see diagram above). You will find an expand box also located on the upper right hand corner of each form.

Upper Form – General Details section

The upper portion of the business process contains basic information such as the name of the record, description, who created the record, when it was created, the type of document and comment section. To expand the section click on the icon located to the left of the section label.

General Submittals

General Info

Record Number: Status:

Description: Creator: [Joe Contractor](#)

Creation Date:

Middle or Lower Form - Action Detail Section

This section typically displays at the lower portion of the form or in the middle (See diagram below). This section allows you to view or assign the next specified recipient to the workflow. Depending on how the workflow is designed the next recipient may be predetermined or you may be able to choose the next recipient or send a copy of the record to another user using a pick list. This section also informs the project team and the recipient on what action is required for the next step (For review, approval acknowledgment, distribution, end, etc).

The To: and Cc: buttons may be active after you select the "Route" from the Workflow Action drop-down located on the upper right hand corner of the form.

All users who have access to the form can track the status of the workflow by clicking on the link beside Task Status. You will find a table and an option to view the graphical workflow diagram

Action Details

Create New Submittals

To:

Cc:

Send For:

Task Notes:

Lower Form – Line Item Detailed Section

The lower portion of the form contains the detail line item and bid item information. Some business processes (for example, Daily Inspection Report) include tabs within this section.

Bid Item Details

Current View: All

0 Item(s) Page 1 of 1 Display

No.	Bid Form Item	Bid Form Item ID	Item Desc

Add Copy Import Remove Grid Find

There are also command buttons associated with the Line Item detailed section, such as:

- ✓ Add button – Allows you to add individual bid items or line item details
- ✓ Copy button – Allows you to copy any existing line item entry.
- ✓ Import button– Allows you to import a spreadsheet from your desktop
- ✓ Remove button – Allows you to delete a line item from the table
- ✓ Grid button – This is a preferred method for entering multiple line items. The view is similar to a spreadsheet.
- ✓ Find button– Allows you to search for a specific line item. Generally used when you have a long list of line items in the table.

Links

Links at the bottom of the business process form allow you to access attachments, linked records, comments and Linked Mail (Linked Mail is not an active feature). As a recipient or project team member reviewing a record, in addition to viewing the content in the upper and lower form, you can also view attachments, linked records or general comment by clicking on the specific link at the bottom of the form.

[Attachments \(0\)](#) [Linked Records \(0\)](#) [General Comments](#) [Linked Mail \(0\)](#)

Document Manager Folder View

SPU Work Order Contracts

- **1. Contracts**
 - Work Order Request
 - Work Order
- **3. Construction**
 - Field
 - Design change
 - Field Memo
 - Request for Information
 - Submittals
 - General Submittals
 - Material Submittals
 - Sub-Contractor Approvals

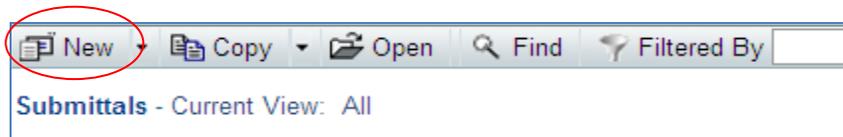
SPU CIP Contracts

- **1. Contracts**
 - Engineers Estimate
 - Contract Docs
 - Award Book
 - Drawings
 - Permits
 - Technical Reports
- **3. Construction**
 - Field
 - Design change
 - Field Memo
 - Request for Information
 - Submittals
 - General Submittals
 - Material Submittals
 - Sub-Contractor Approvals

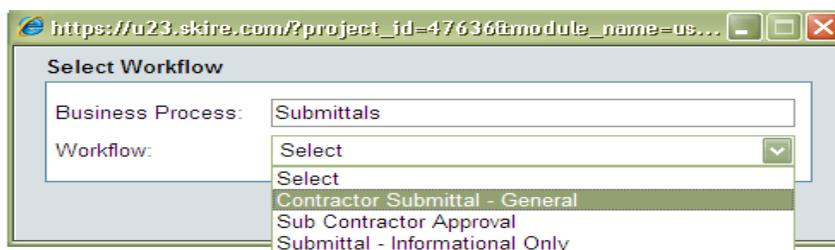
2. Submittals



1. Double click the Submittal BP
2. From the Toolbar, click New.



3. A workflow box will display (see below), choose accordingly:



- ✓ **Contractor Submittals:** select for all general types of submittals which will need to be reviewed and approved. You would not use this workflow for SubApprovals or for submittals which are for information only.
- ✓ **Sub Contractor Approval:** select if you are submitting Sub Approvals for your subcontractors.
- ✓ **Submittal – Information Only:** select if for all submittals which do not require an approval process and is merely for information only. Please contact your CMD Submittal Lead for clarification if you are unsure.

4. Expand the upper form (General).



5. Enter appropriate information in the upper form:
 - Description (use a consistent naming convention)
 - Contractor Ref #
 - Contractor Comments (if applicable)
 - Select the Document Type (ie. Shop Drawing, Plans, etc.)

Note any field that has an asterisk requires an entry.

6. Click the expand/collapse icon on the corner of the upper form, to minimize the upper form.
7. Expand the lower form.
8. Right below the lower form you will find command buttons (see below). Select the Add button or select the Grid button to begin adding bid items.

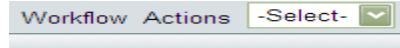


Add Button

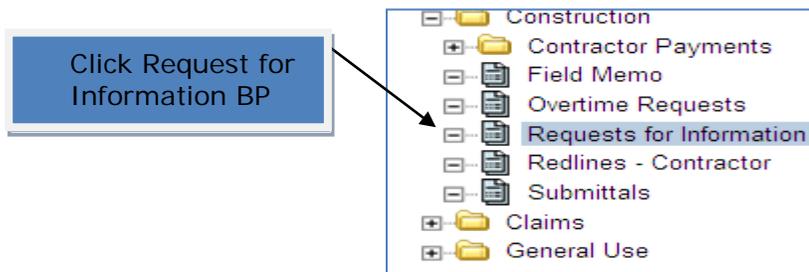
- a. To enter bid Item, click the Select button, the bid item list will display.
- b. Double click on the specific bid item
- c. Repeat Steps a and b, to add more bid items

Grid Button

Row	Line No.	Bid Form Item	Bid Form Item ID	Item Desc	Short Description*
1					Document Metadata

- 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 Steps a, b, and c, to add more bid item.
 - e. Save and Close.
9. To add your PDF formatted submittal document, click Add Attachment and select My Computer
 10. Click the Browse button
 11. Find your document and click the Open button
 12. Click Close.
 13. Go the Workflow Action dropdown on the upper right hand corner and select "Route".
- 
14. From the Toolbar, click Send.

Request For Information



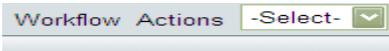
1. Double click the Request for Information BP
2. From the Toolbar, click New.

PW #	Record Number	Document Description	Status
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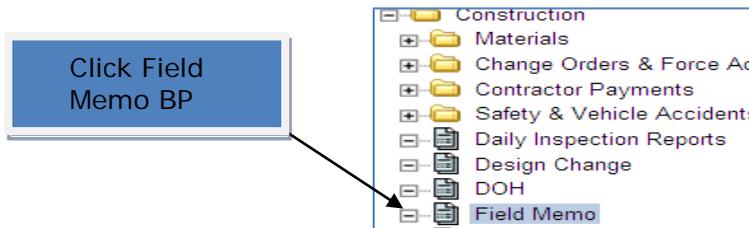
3. Expand the upper form (General).
4. Enter appropriate information in the upper form:
 - Description (use a consistent naming convention and a clear description)
 - Ref #
 - Nature of Work
 - Reference Drawings
 - Reference Specification
 - Description (What is the information you are requesting?)

NOTE: You have an option to add additional supporting documentation if needed.

- To add a document, click the Add Attachment button located on the Toolbar.
- Click the Browse button
- Find your document and click the Open button
- Click the Close.
- Go the Workflow Action dropdown on the upper right hand corner and select "Route".
- From the Toolbar, click Send.



Field Memo (FM)



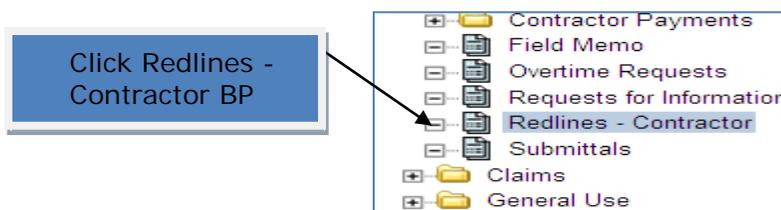
NOTE: Construction Engineer will generally send Field Memo via Unifier if time permits. There will be circumstances when the Construction Engineer will need to expedite a directive in the field and therefore a Contractor Rep will receive a hard copy in the field. Construction Engineer will upload the signed hardcopy of this documentation into the Field Memo BP and route for Acknowledgement.

Your only "Task" in the Field Memo BP is to acknowledge receipt. To do this:

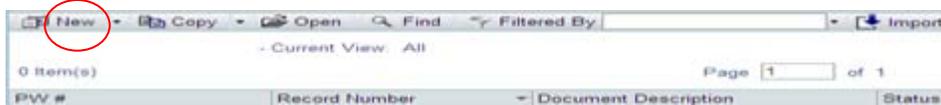
1. Accept Task
2. Review information in the Field Memo
3. Go to the upper right hand corner of the form and select "Acknowledge."
4. Click Send

To view list of all field memos submitted by Construction Engineer, click the Field Memo BP (see above).

Redlines - Contractor



1. Double click the Redlines – Contractor BP
2. From the Toolbar, click New.

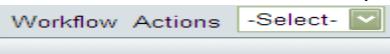


3. Expand the upper form (General).
5. Enter appropriate information in the upper form:
 - Description (use a consistent naming convention and a clear description)
 - Contractor Ref #
 - Document Type
 - Contractor Comments (if applicable)
4. Click the Add Attachments button from the Toolbar, and select My Computer
5. Click the Browse button and find your Redlines/Asbuilts that you saved on your desktop.



6. Click on the file and click the Open button

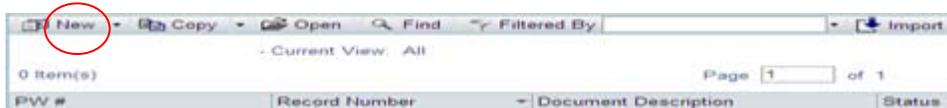
- Click the Close button. You will notice the number of Attachments increased at the bottom of the window.

- Go the Workflow Action dropdown on the upper right hand corner and select "Route".

- From the Toolbar, click Send.

Inbound Correspondence



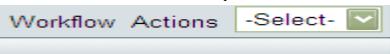
- Double click the Inbound Correspondence BP
- From the Toolbar, click New.



- Expand the upper form (General).
- Enter appropriate information in the upper form:
 - Description (use a consistent naming convention and a clear description)
 - Contractor Ref #
 - Document Type
 - Comments (if applicable)
- Click the Add Attachments button from the Toolbar, and select My Computer
- Click the Browse button and find your correspondence that you saved on your desktop.



- Click on the file and click the Open button
- Click the Close button. You will notice the number of Attachments increased at the bottom of the window.

- Go the Workflow Action dropdown on the upper right hand corner and select "Submit".

- From the Toolbar, click Send.