SAN FRANCISCO PUBLIC UTILITIES COMMISSION INFRASTRUCTURE CONSTRUCTION MANAGEMENT PROCEDURES	
SECTION: SFPUC INFRASTRUCTURE CONSTRUCTION MANAGEMENT	APPROVED:
PROCEDURE NO: 002	DATE: 6/7/2019
TITLE: CONSTRUCTION MANAGEMENT INFORMATION SYSTEM (CMIS) ACCESS AND HELP REQUESTS	REVISION: 1

1.0 Policy

SFPUC Infrastructure Construction Management (CM) team members and Contractors who use the Construction Management Information System (CMIS) in the course of their work shall have access to assistance. Questions and answers shall be available to all CMIS users and shall be incorporated into a Frequently Asked Questions document available on the CMIS.

This SFPUC Infrastructure CM Procedure applies to all personnel working on SFPUC Infrastructure Projects during construction to the extent that their work is affected by this CM Procedure and does not conflict with specific SFPUC policies or the Contract under which the Work is executed. This procedure applies to all users of the CMIS.

2.0 Description

The CMIS is based on Oracle Primavera Unifier software. Users of the CMIS may at any time request assistance regarding any aspect of the use of the CMIS, including procedures, processes, techniques, system configuration and system access. This assistance may be requested in person, by telephone, email (see Paragraph 5.4.2). Responses shall be within 24-hours. Resolutions that require more time shall be tracked, and the requestor shall be notified of the extension of time and shall be advised of progress toward resolution.

System access is dependent on network access, either internally through the SFPUC intranet or through the Citrix Gateway from computers external to the SFPUC intranet or via internet access for cloud-based systems. Access to the CMIS also requires a CMIS account, logon identification and password. Use of the CMIS requires training in and use of the standard CMIS Business Processes (BPs) and latest Infrastructure CM Procedures. Assistance in system access, understanding of the CMIS configuration and procedures and proper use of CMIS is available to any user at any time.

3.0 Definitions

3.1 Construction Management Information System (CMIS)

The CMIS is an on-line management tool for the processing of construction documents based on established SFPUC Infrastructure Business Processes. It serves as a tool for effective storage and retrieval of various documents generated during a construction project. The documents normally tracked are those that are used by the Contractor and the CM team members.

3.2 CMIS System Administrator

The CMIS System Administrator is identified as the Company Administrator in Unifier. As the name implies, the Company Administrator's role in Unifier is to control and administer the various SFPUC Enterprises and their differing construction programs based on a hierarchy system for each Enterprise. The CMIS System Administrator provides all the access and capabilities necessary for the CM team members and Contractors to perform their work in accordance with the Contract, established Business Processes and Procedures. The CMIS System Administrator is responsible for setting up the Project hierarchy within a Program. Furthermore, the CMIS System Administrator defines and provides the Business Process templates for a Program or a Project to use.

3.3 CMIS Project Administrator

The CMIS Project Administrator is a member of the CM team and is given additional access capabilities to various Business Processes by the CMIS Administrator. With this capability, the CMIS Project Administrator can serve as a proxy for others to whom Business Processes are assigned and can process documents accordingly.

4.0 Responsibilities

4.1 CMIS System Administrator

The CMIS System Administrator shall be responsible for:

- Configuring and maintaining Business Processes pertaining to the CMIS in accordance to established CM Procedures.
- Preparing training and reference materials for use by end-users of the CMIS. Updating materials as necessary to reflect updated user interface and/or functionality after software upgrades.

- Creating new user accounts and providing responses to help calls regarding CMIS logon and password resets

- Assisting the CMIS Project Administrator in resolving other project-level CMIS issues, as needed.

- Performing all configuration changes to existing BPs, creation of new BPs, creation of custom reports and custom print templates.

4.2 Resident Engineer (RE)

The RE shall ensure that all CM team members and designated contractor personnel who require use of the CMIS in the performance of their functional roles, are identified and initially trained by the CMIS Administrator. The RE is responsible for the consistent and quality use of the CMIS on the project as defined by the Business Processes and CM Procedures.

4.3 CMIS Project Administrator

On each project, the RE shall designate a CMIS user, generally the Administrative/Document Controls Specialist (ADCS) or the Office Engineer (OE), with good computer skills, to assist the CM team members in the use of the CMIS. In general, the CMIS Project Administrator can proxy for other (absent) CM team members so that the document workflow can proceed in a timely manner. Other responsibilities include:

- Coordination with the SFPUC Information Technology Services (ITS) for system access through the SFPUC intranet and the Citrix Gateway.

- Requesting new user accounts from the CMIS System Administrator.

- Training new users of the CMIS.

- Responding to end-user help requests regarding use of the existing BPs.

- Creating requests for the CMIS System Administrator for configuration changes to existing BPs.

4.4 SFPUC Information Technology Services (ITS) Group

The ITS Group shall assist the CMIS Administrator to resolve technical questions or problems related to issues outside the CMIS environment, such as networking connectivity and server setup issues.

The ITS Group also provides an ITS Help Desk to all users   to resolve technical questions or problems. When such problems are CMIS-specific, they are forwarded to the CMIS Administrator for resolution.

At the request of, and in coordination with, the CMIS Administrator, ITS shall create Citrix accounts for Contractors and for SFPUC personnel authorized to access the CMIS remotely.

4.5 Responsibility Matrix

All questions regarding the CMIS and/or software access issues shall be addressed   to   the   CMIS   Administrator   via   email   at

UnifierHelp@sfwater.org. When questions need to be addressed by the ITS Group, the CMIS Administrator will coordinate with ITS for resolution, and respond back to the requestor.

5.0 Implementation

5.1 CMIS Administrator

The CMIS Administrator shall be responsible for:

- Developing, coordinating and maintaining Business Processes pertaining to the CMIS in accordance to established CM Procedures.

- Training new users in their respective roles, providing follow-on training and monitoring use to determine effective training practices and materials.

- Providing responses to help calls regarding CMIS logon, processes and procedures, use of CMIS and reports.

- Coordinating with the SFPUC Information Technology Services (ITS) for system access through the SFPUC intranet and the Citrix Gateway and identifying technical issues that are under the purview of ITS.

- Assisting the CMIS Project Administrator in resolving other project-level CMIS issues, as needed.

5.2 Resident Engineer (RE)

The RE shall ensure that all CM team members and designated contractor personnel who require use of the CMIS in the performance of their functional roles, are identified and initially trained by the CMIS Administrator. The RE is responsible for the consistent and quality use of the CMIS on the project as defined by the Business Processes and CM Procedures.

5.3 CMIS Project Administrator

The CMIS Administrator shall assist the CM team members in the use of the CMIS. In general, the CMIS Project Administrator can proxy for other (absent) CM team members so that the document workflow can proceed in a timely manner.

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5.5 Responsibility Matrix

All questions regarding the CMIS and/or software access issues shall be addressed to the CMIS Administrator via email at UnifierHelp@sfwater.org. When questions need to be addressed by the ITS Group, the CMIS Administrator will coordinate with ITS for resolution, and respond back to the requestor.

6.0 Other Procedural Requirements

None

7.0 References

7.1 Technical Specifications

None

7.2 SFPUC Infrastructure CM Procedures

None

7.3 Others

None

8.0 Attachments

002 - 1   Project Setup Request – Form

002 - 2   CMIS User Access Request - Form

002 - 3   Revision Control Log updated

Attachment 002 -1
Project Setup Request – Form

Create New Project Setup Request

	New Project Setup Request

General

Record No: [   ]

Title: [   ]

Contract Number: [   ]

Creator: Company Administrator

Creation Date: [   ]

Due Date: [   ]

Status: [   ]

Project Summary

Description: [   ]

Justification: [   ]

Project Details

Project Name: [   ]

Project Type: -Select-

Project Manager: -Select-

Project Shell Information

The information below will be used to define project shell creation upon approval.

Project Number: [   ]

Shell Location: [   ] -Select-

Shell Templates: [   ] -Select-

Status: -Select-

Administrator: [   ] -Select-

Created Shell: [   ]

Location

Address 1: [   ]

Address 2: [   ]

Address 3: [   ]

City: [   ]

State/Province: -Select-

Zip/Postal Code: [   ]

Country: -Select-

Latitude: [   ]

Longitude: [   ]

Attachment 002 -2
CMIS User Access Request - Form

Create CMIS User Access Request Form

CMIS User Access Request

General

Creator: Company Administrator

Record No:

Title:

Contract Number:

Creation Date:

Due Date:

Status:

Project Summary

Description:

Justification:

Project Details

Project Name:

Project Type: -Select-

Project Manager: -Select-

Project Shell Information

The information below will be used to define project shell creation upon approval.

Project Number:

Shell Location: -Select-

Shell Templates: -Select-

Status: -Select-

Administrator: -Select-

Created Shell:

Location

Address 1:

Address 2:

Address 3:

City:

State/Province: -Select-

Zip/Postal Code:

Country: -Select-

Latitude:

Longitude:

Attachment 002 - 3
Revision Control Log

Revision No.	Revision Date	What changed?
Rev 1	6/7/19	- Minor format changes - Section 3.0; 3.2 where "system" has been added to CMIS Administrator - Section 4.0, 4.1 and 4.3 changes to text - Section 5.0 - revised - Attachments - revised - Revision Control Log - updated
Rev 0	11/14/16	Signed