

User Guide

Principal

Site Discretionary Request

Contents

Site Discretionary Project Manager	Error! Bookmark not defined.
Quick Start (Directly to Unifier Portal)	2
Navigation (from Staff Portal to Unifier Portal)	3
Site Discretionary Dashboard	4
Create a New Site Discretionary Request.....	5
Complete Request Form:	5
Tracking your Request.....	6
Interpreting the Request Form	8
Cancelling your Request.....	9
Troubleshooting:	10

CONTACT INFORMATION

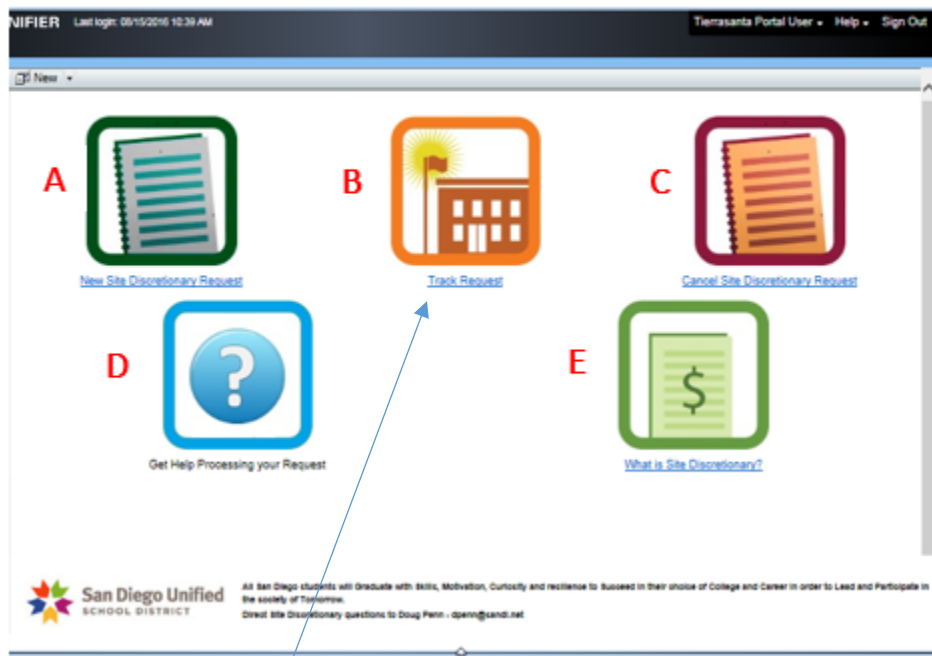
1. Site Discretionary Project Manager –
Douglas Penn works for PM in FPC, he is the PM for all SD items
dpenn@sandi.net

2. User Login & Password Information -
sdusdfacilitiesinfo@sandi.net

Quick Start (Directly to Unifier Portal)

1. Bypass www.sandiegounified.org - Users can bypass logging in the Staff Portal by using the Unifier Portal link (below)
2. Log Requests directly in Unifier using link: <https://unifier.sandi.net/portal>
3. Use Login & Password provided
Contact sdusdfacilitiesinfo@sandi.net for questions regarding Login & Password

Site Discretionary Dashboard



A – Principal create a new request

B – View request history

C - Cancel existing request

D- Instructions

E- Explanation of Site Discretionary

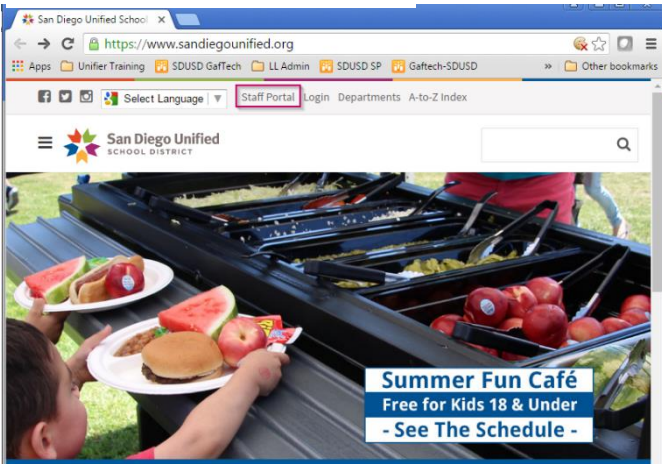
NOTE: If you click on the TRACK REQUEST AND you get a login screen ENTER YOUR STAFF PORTAL CREDENTIALS

The 'Authentication Required' dialog box displays the URL <https://fpcreports.sandi.net> and states it requires a username and password. The 'User Name' field is populated with 'Sdcs\prs-tlabruno' and the 'Password' field is masked with '*****'. 'Log In' and 'Cancel' buttons are located at the bottom of the dialog.

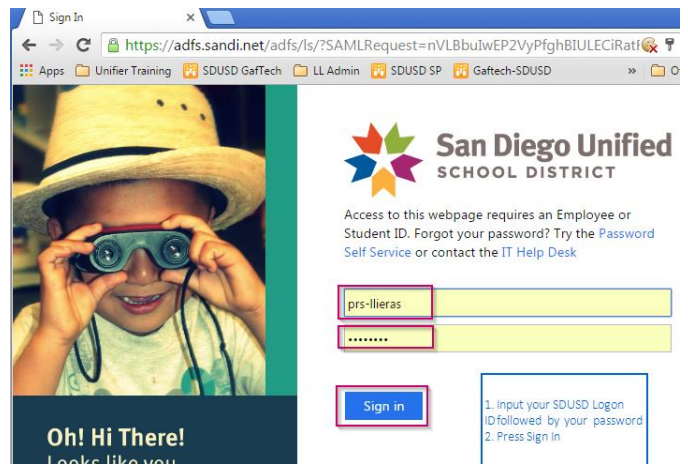
Navigation (from Staff Portal to Unifier Portal)

<https://www.sandiegounified.org/> (Accessible via the Staff Portal)

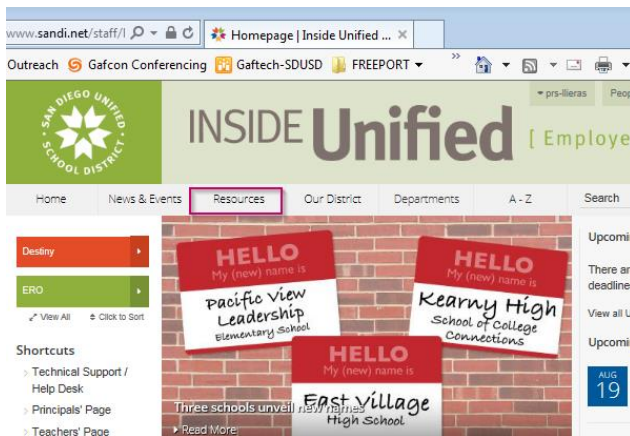
1. Select: "STAFF PORTAL"



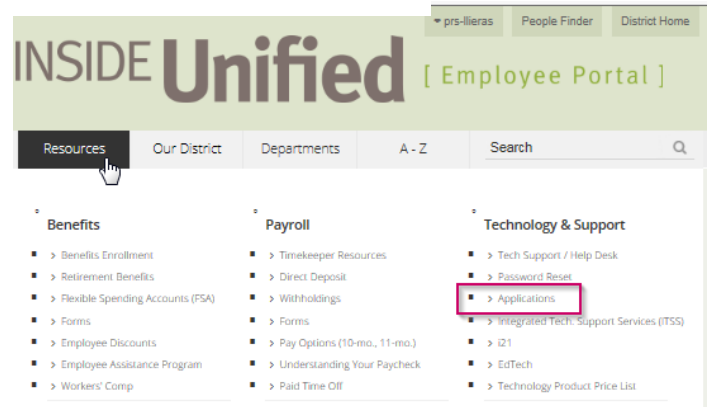
2. Enter SDUSD credentials



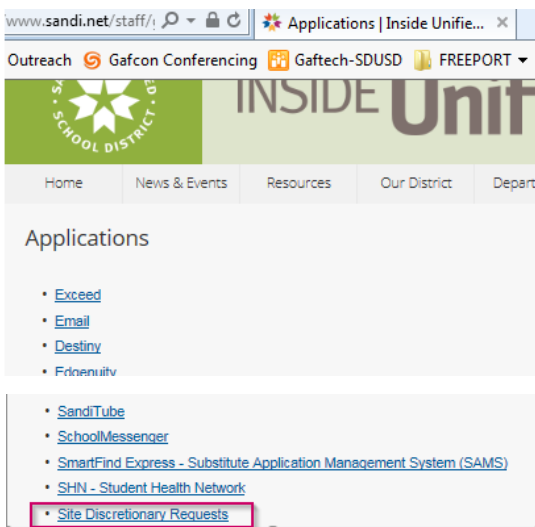
3. Select: "RESOURCES"



4. Select "APPLICATIONS"



5. Select "SITE DISCRETIONARY REQUESTS"



Note: User will be directed to Unifier

6. User input Unifier User Name & Password



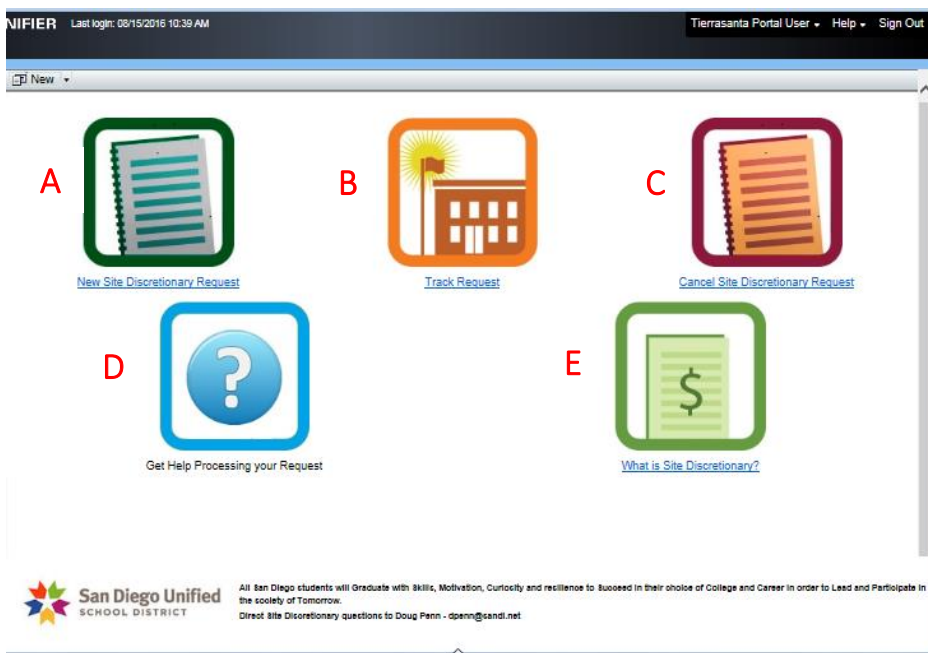
The image shows the Oracle Primavera Unifier login portal. At the top is the Oracle logo in red. Below it, the text "PRIMAVERA UNIFIER" is displayed in a large, bold, black font. Underneath, the word "Portal" is written in a smaller font. The login form consists of two input fields: "User Name" and "Password", both outlined in pink. To the right of the "User Name" field is a checkbox labeled "Remember me" which is checked. Below the "Password" field is a link that says "Forgot Password?". At the bottom of the form is a blue button with the text "Sign In".

Principal to enter

1. User Name
2. Password

Note: Check "REMEMBER ME"

Site Discretionary Dashboard



The screenshot shows the Site Discretionary Dashboard. At the top, there is a header bar with "UNIFIER" on the left, "Last login: 08/15/2016 10:39 AM" in the middle, and "Tierrasanta Portal User - Help - Sign Out" on the right. Below the header, there is a navigation bar with a "New" button. The main content area contains five icons labeled A through E. Icon A is a green document icon with the text "New Site Discretionary Request" below it. Icon B is an orange building icon with the text "Track Request" below it. Icon C is a red document icon with the text "Cancel Site Discretionary Request" below it. Icon D is a blue question mark icon with the text "Get Help Processing your Request" below it. Icon E is a green document icon with a dollar sign and the text "What is Site Discretionary?" below it. At the bottom of the dashboard, there is a footer with the San Diego Unified School District logo and a message: "All San Diego students will Graduate with Skills, Motivation, Curiosity and resilience to Succeed in their choice of College and Career in order to Lead and Participate in the society of Tomorrow. Direct Site Discretionary questions to Doug Penn - dpenn@sandi.net".

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Create a New Site Discretionary Request



New Site Discretionary Request

Complete Request Form:

1. Status – select “open” (*required*)
2. School – **Input your school name** (*required*)
3. Principal – Input principals name
4. Phone – Input your contact phone number
5. Location No. – Input school location number
6. Contact Name – Input first & last name + phone number if different from principal
7. Description – Input as much known detail about the requested items/work
8. Request Type - if known, select type from dropdown (Construction, FF&E, Other)
9. Reason for Request – Input reason items/work is needed
10. Pre-Approved Amount – Principals estimated approved amount
11. Required By – Input the desired completion date
12. Submit – when form is complete, click on “SUBMIT” button

The screenshot shows a web browser window with the 'Site Discretionary Request' form. The form is titled 'Upper Form' and includes the following fields and sections:

- Record Number:** (empty)
- Status:** Open (dropdown menu, circled 1)
- Creator:** Tierrasanta Portal User
- Creation Date:** (empty)
- Record Last Update Date:** (empty)
- School:** Tierrasanta - Flag Pole (circled 2)
- Principal:** Principal XYZ (circled 3)
- Phone:** 619-777-7777 (circled 4)
- Location No.:** 1234 (circled 5)
- Contact Name - if not Principal:** Jane Doe (circled 6)
- DETAILED DESCRIPTION OF SERVICES REQUESTED (Attach sketches as necessary):**
 - Description:** Replacement of 50 year old flag pole (circled 7)
 - 1. Need pole
 - 2. Concrete
 - 3. Flag
 - Request Type:** (dropdown menu, circled 8)
 - Reason for Request:** Replacement (circled 9)
- Pre-Approved Amount:** 0.00 (circled 10)
- Required By:** (calendar icon, circled 11)
- Submit** button (circled 12)

Notification

Site Discretionary Request SDR-000283 has been created successfully.

OK

Note: After submitted, the system will return a confirmation

After user submits – Doug will receive a system generated notification)

Doug will review and place request on the Tracking Report (request will not show on Tracking Report until Doug has reviewed)

Tracking your Request



[Track Request](#)

1. Prop S/Z Allocations – the amount that has been allocated to your school
2. Balance Remaining – the available dollars the school has remaining
3. Total Committed (Pre-Approved) – FPCs Estimated Cost to complete the request. If no Estimated Cost is provided by FPC, then the amount shown will be the principals preapproved amount
4. Status – Submitted (new request)
Assigned (request is in progress)
Completed
Cancelled



Site Discretionary Tracking for Tierrasanta Elementary

SAN DIEGO UNIFIED SCHOOL DISTRICT Facilities Planning & Construction / Physical Plant Operations
4880 Ruffner St San Diego, CA 92111-1522

Prop S/Z Allocation: \$177,400.00

Balance Remaining: \$170,646.12

Site Discretionary #	Title / Description	Created	Total Committed <i>(else Pre-Approved)</i>	Status	Task Owner / Action	Required Completion Date
SDR-000284	This is the lengthy description.	8/15/2016	<i>\$10,000.00</i>	Submitted		8/24/2016
SDR-000282	School garden	8/12/2016	<i>\$25,000.00</i>	Submitted		4/3/2017
SDR-000281	New Marquee	8/12/2016	<i>\$10,000.00</i>	Submitted		1/1/2016
SDR-000278	xyz	8/11/2016	<i>\$250,000.00</i>	Submitted		
SDR-000277	test	8/11/2016	<i>\$10,000.00</i>	Submitted		
SDR-000276	I want new stuff	8/11/2016	<i>\$1,000.00</i>	Submitted		9/9/2016
SDR-000255	New pull down screen for auditorium http://www.officedepot.com/a/products/633023/Elite-Screens-SPM1	6/27/2016	<i>\$325.00</i>	Assigned		8/26/2016
SDR-000254	4 stand up desks for a classroom (alternative seating) http://www.wayfair.com/Ergonomics-Height-A	6/27/2016	<i>\$850.00</i>	Assigned	Phuong Zahirovic	8/24/2016
SDR-000251	6 classroom rugs from Lakeshore 30 squares "a place for everyone- bright colors" Item# LA952	6/23/2016	<i>\$3,000.00</i>	Assigned	Todd Runge	8/1/2016

Note: User can open a request on the tracker using the hyperlink

Note: The tracker report will show the pre-approved amount (italicized) unless there is a commitment in which case it shows the committed amount (not-italicized)

Note: Font will be red if the record is open and COMPLETION DATE is within 7 days or has passed

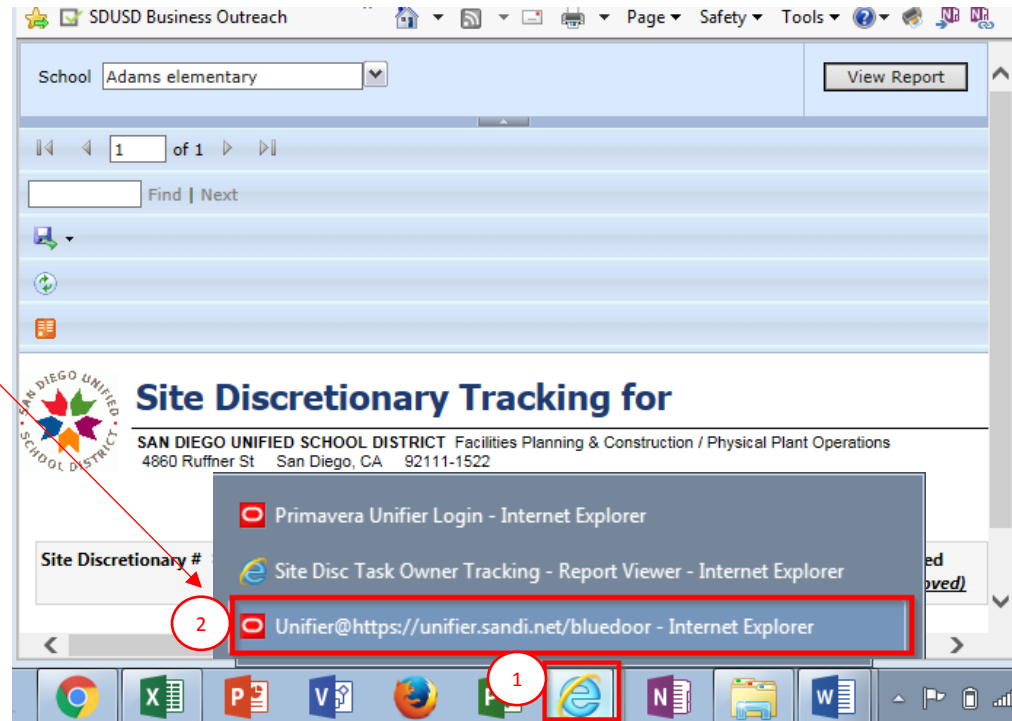
TIP: To get back to dashboard

1. Hover over the browser Icon

and

2. Select

unifier@https://unifier.sandi.net/
bluedoor (i.e. Unifier dashboard)



*In this example I'm using
Explorer*

*You may be using Chrome
or Safari.*

Look for your relevant icon)

Interpreting the Request Form

(accessible via Tracking Report > click hyperlink)



Site Discretionary Request Form

SAN DIEGO UNIFIED SCHOOL DISTRICT Facilities Planning & Construction / Physical Plant Operations
4880 Ruffner St San Diego, CA 92111-1522

Summary Report

School:	Tierrasanta ES	Location No.:		Date:	8/12/2016
Principal:	LaMonica Lieras	Contact:		Phone:	
DETAILED DESCRIPTION OF SERVICES REQUESTED (Attach sketches as necessary)					
School garden					
Request Type:	Construction, Furniture/Equipment				
REASON FOR REQUEST (Problem / Need)					
We received grant money to establish a school garden, but it is not enough					
Pre-Approved Amount:	\$25,000.00				
Required By:	4/3/2017				
INTERNAL USE ONLY (STATUS OF REQUEST)					
Site Discretionary Request #			Status		
SDR-000282			Submitted		
Estimate to Complete Total Committed Actual Cost to Date Cost at Completion					
Estimate to Complete	Total Committed	Actual Cost to Date	Cost at Completion		
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

1. Pre-Approved Amount – Amount principal input on request form, ball park estimate of request cost
2. Estimate to Complete – The amount FPC estimates to complete the request
3. Total Committed (to date) – The contracted to date
4. Actual Cost to Date – Amount paid to vendor(s)
5. Cost at Completion – Balance remaining (Estimated Cost to Complete minus Actual Cost to date)

Cancelling your Request



Cancel Site Discretionary Request

An existing request can be cancelled using the “Cancel Site Discretionary Request” icon

1. Input Site Disc Request # (from Tracker Report and input in Cancel screen)
2. Input Description
3. Click “Finish Editing”

Record Number: Creator: [Tierrasanta Portal User](#)

Status: Creation Date:

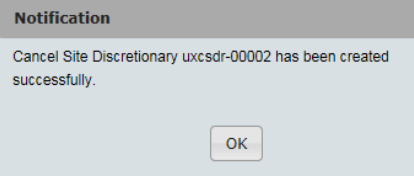
Record Last Update Date:

Type in the Site Discretionary Request # or a brief Description and click Save

Site Disc Request #: Description:

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

Note: Doug will receive a system generated email to cancel the request

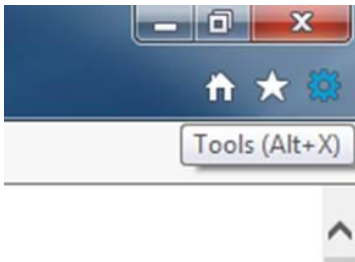


Troubleshooting:

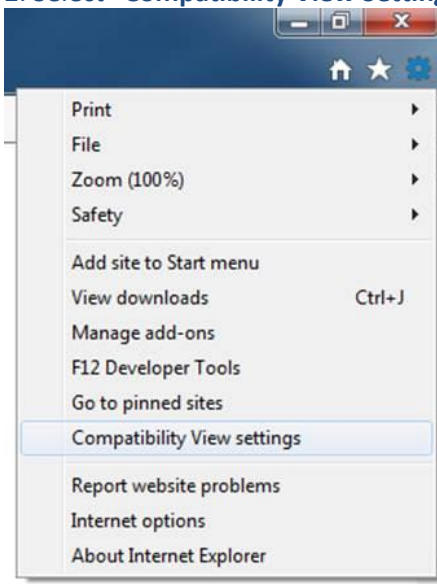
If you run the Tracker Report and it looks odd, it could be your settings

Site Discretionary #	Title / Description	Created	Total Committed <i>(else Pre-Approved)</i>	Status	Task Owner / Action	Required Completion Date
SDR-000287	need a new apple computer	8/16/2016	\$1,000.00	Submitted		8/16/2016
SDR-000286	Description of request	8/16/2016	\$14,000.00	Submitted		8/29/2016
SDR-000284	This is the lengthy description.	8/15/2016	\$10,000.00	Submitted		8/24/2016
SDR-000282	School garden	8/12/2016	\$25,000.00	Submitted		4/3/2017

1. Click on the “Tools” gear on the top right hand side of your Internet Explorer window:



2. Select “Compatibility View Settings”



3. Add <http://fpcreports.sandi.net/> to compatibility view

